

## Module 2

### Chapter 3

## Managing Position Hierarchy Using COREDOC

### Overview

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**Introduction** This chapter explains the use and functionality of the Department of Defense Core Document System (COREDOC). COREDOC is an application included in the DCPDS as part of the Position Management and Classification function. It includes a cover sheet, position description, performance plan, training competencies, and knowledge, skills, and abilities (KSAs) for staffing.

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### Before you Begin

- Component use of COREDOC is optional.
  - NAF does not use COREDOC.
  - All Agencies may not use the Performance Plan.
  - Neither the General Schedule Supervisory Guide (GSSG) nor the GS Leader Grade Evaluation Guide is presently available.
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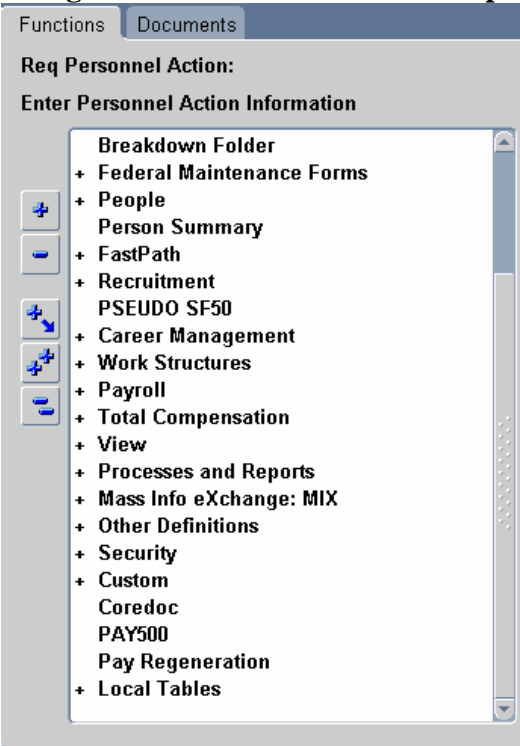
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# Accessing and Navigating in COREDOC

**Purpose** This section explains how to access the COREDOC Application and navigate through the system using the menu items, user default information data fields, and exiting.

- Section Contents**
- Accessing COREDOC
  - COREDOC Main Menu Bar
  - File Menu
  - Utility Menu
  - User Default Information Window
  - Window Menu
  - Help Menu
  - Exiting COREDOC

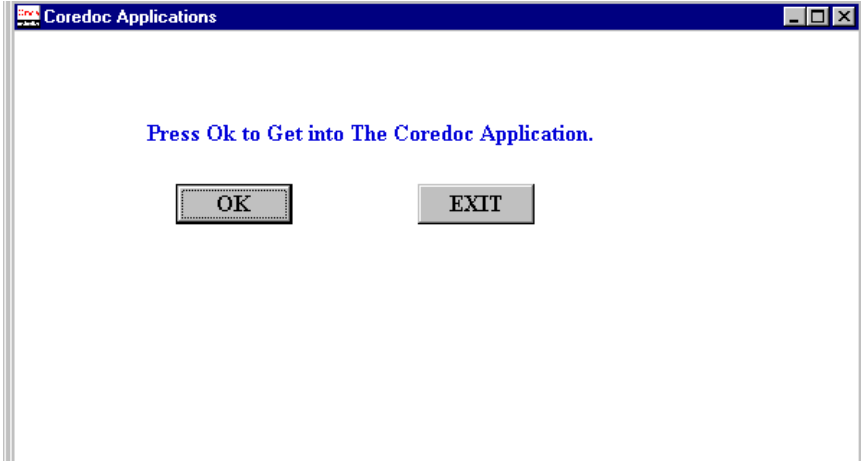
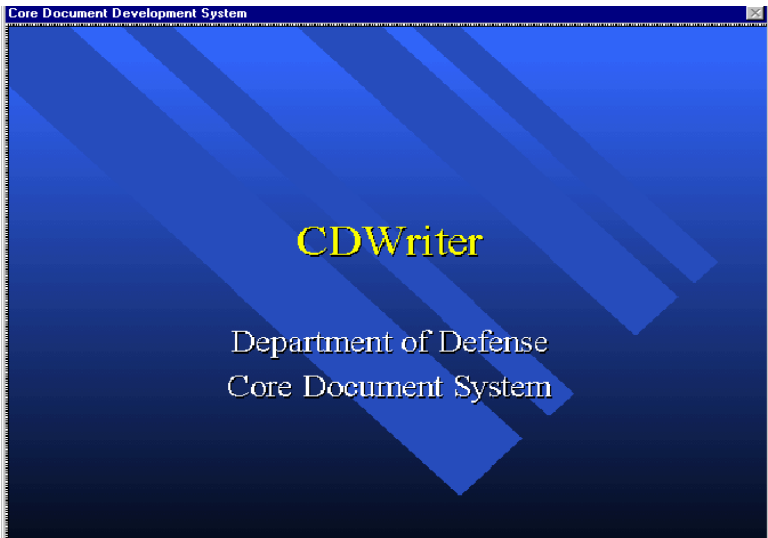
## Accessing COREDOC

Step	Action
1	<p><b>Navigation Path</b> ▢ <i>Coredoc</i> ▢ &lt;Open&gt;.</p> 

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## Accessing and Navigating in COREDOC, Continued

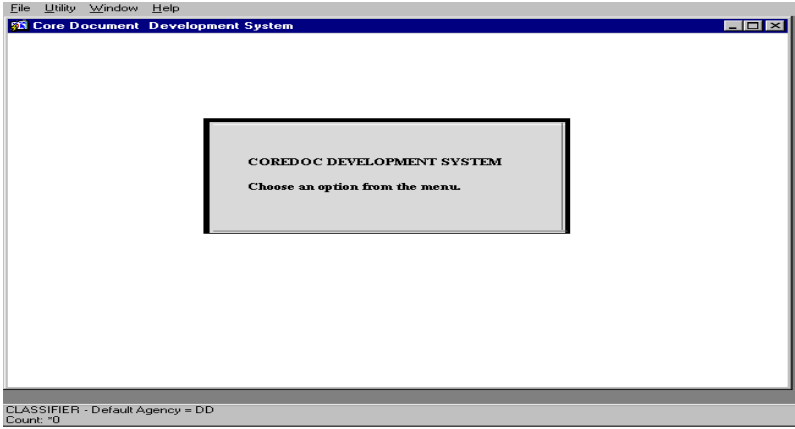
### Accessing COREDOC (continued)

Step	Action
2	<p>The <b>Core Applications</b> window opens. Click &lt;OK&gt;.</p> 
3	<p>Clicking &lt;OK&gt; opens the <b>Core Document Development System Title</b> window</p> 

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## Accessing and Navigating in COREDOC, Continued

### Accessing COREDOC (continued)

Step	Action
4	<p>The <b>Core Document Development System</b> window opens with the Main Menu Bar selections for accessing the COREDOC processes and functions.</p> 

### COREDOC Main Menu Bar

The four main menu selections are described below.

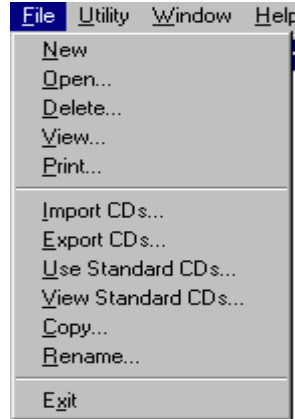
Menu Item	Description
<b><u>F</u>ile</b>	Allows you to perform a variety of processes and functions. You can create, delete, view, print, import, export, copy, use and view standard core documents (CDs) or rename them.
<b><u>U</u>tility</b>	You can establish system-generated defaults for the CD. In addition, users with “Classifier” or “Super User” role can assign a Civilian Personnel Control Number (CPCN) to a CD.
<b><u>W</u>indow</b>	You are provided three choices for displaying open windows in COREDOC. You can arrange them according to viewing preference.
<b><u>H</u>elp</b>	Provides Help System Maintenance entries and general information About CD Writer.
	<b>Note:</b> <u>O</u> pen, <u>D</u> ele <del>t</del> e, <u>V</u> iew, <u>P</u> rint, <u>C</u> opy, <u>R</u> ename are grayed out, until a new COREDOC is created.

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## Accessing and Navigating in COREDOC, Continued

### File Menu

The **F**ile menu is used to perform a number of functions. To access the **F**ile menu, click **F**ile on the Main Menu Bar. The following menu opens.



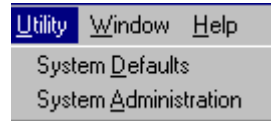
Click	To.../Function
<b>N</b> ew	Create a new core document (CD).
<b>O</b> pen...	Open an existing CD. See <i>How to Modify a Core Document</i> in this module for additional information.
<b>D</b> elte...	Delete an existing CD.
<b>V</b> iew...	View a CD while working in the application. See <i>How to View a Core Document</i> in this module for additional information.
<b>P</b> rint...	Print a copy of a CD.
<b>I</b> mport CDs...	Import COREDOC is not available.
<b>E</b> xport CDs...	Export COREDOC is not available.
<b>U</b> se Standard CDs...	Copy a core document from the standard library, if necessary.
<b>V</b> iew Standard CDs...	View a standard core document.
<b>C</b> opy...	Duplicate an existing regular or standard core document in your directory.
<b>R</b> ename...	Assign a new name to an existing regular or standard CD.
<b>E</b> xit	Exit from CD Writer to the <b>COREDOC Applications</b> window. You can continue the <b>E</b> xit process and return to the <b>N</b> avigator window.

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## Accessing and Navigating in COREDOC, Continued

### Utility Menu

Click **Utility** on the Main Menu Bar to access the **Utility** menu.



Option	Available for
<b>Systems Default</b>	Any user of the COREDOC Application.
<b>System Administration</b>	Users who have been designated as Systems Administrators for the COREDOC Application.

### User Default Information Window

The **User Default Information** window opens when **Utility** is clicked on the Main Menu Bar. The data areas are described below.

 A screenshot of the 'User Default Information' window. The title bar reads 'Privacy Act of 1974 - [Core Document Development System - User Default Information]'. The window contains several fields and checkboxes:
 

- Oracle User ID:** MCKNIGC
- Output Format:** Radio buttons for 'Core Document' (selected) and 'Position Description'.
- On/Off Settings For:** Checkboxes for 'Critical/Noncritical' (checked), 'Percentage for FWS Positions' (checked), 'Show KSA Linkage To Specific Duties' (checked), and 'Automatic Staffing KSA Selections' (checked).
- Agency Code:** Text field with 'DD'.
- CoreDoc Access:** Text field with 'C'.
- Import/Export CDs:** Checkboxes for 'Import CDs' (checked) and 'Export CDs' (unchecked).
- Organization Name:** Text field with 'CPMS'.
- Organization Goals:** A large text area containing 'Support DoD organizational goals.'.
- Buttons:** 'Save' and 'Exit' buttons at the bottom.

The first time you access COREDOC, you will be prompted to complete the blank **User Default Information** window. This window allows you to enter certain defaults and establish a standard **Name** and **Goals** for the organizations for which you have responsibility. The information that you type in the data fields will be generated on each CD that you process, eliminating the need to retype the information.





**Note:** The window has predetermined defaults that may or may not be compatible with the organization you service. You must review the defaults and make the appropriate changes to the data fields.

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## Accessing and Navigating in COREDOC, Continued


### User Default Information Window (continued)

User Default Information Window Data Field	Description
<b>Oracle User ID</b>	Contains the Oracle User Identification assigned to you. This field cannot be modified.
<b>Output Format</b> 	You can determine the type of output desired, e.g., CD or Position Description. <b>Note:</b> It is recommended you retain the CD as the default.
<b>On/Off Setting For:</b>	You can “3” on or off for any of the boxes next to the settings by clicking inside the box. The settings are described below. <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Critical/Noncritical</b> – automatically designates all selected duties as critical when activated.</li> <li><input type="checkbox"/> <b>Percentage for FWS Positions</b> – you should not select this option unless your Agency/Organization requires duty percentages to appear for wage grade positions.</li> <li><input type="checkbox"/> <b>Show KSA Linkage to Specific Duties</b> – allows you to show the linkage between a selected duty statement and competency (KSA) for a CD.</li> <li><input type="checkbox"/> <b>Automatic Staffing KSA Selections</b> – allows automatic selection of KSAs for a CD.</li> </ul>
<b>Agency Code</b> 	Designates the format of the core document, and in particular, the Performance Management Plan. Click the <b>Agency Code</b> data field to access the drop-down menu, highlight your agency, and click <OK>. You can select from the choices indicated on the drop-down menu (Air Force, Army, DoD, Marines, National Guard, and Navy). <b>Note:</b> The Fourth Estate Agencies and other Agencies should use the “DD” Agency Code.

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## Accessing and Navigating in COREDOC, Continued

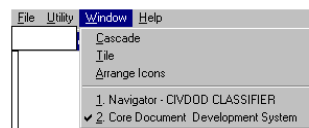
### User Default Information Window (continued)

Data Field	Description
<b>Coredoc Access</b>	Indicates the status that you are using to access the <b>User Default Information</b> window. The system default is a Classifier. The other options are “S” for Super User, and “M” Coredoc Manager.
<b>Import CDs</b>	Import CDs is not available.
<b>Export CDs</b>	Export CDs is not available.
<b>Organization Name</b>	Allows you to enter a default <b>Organization Name</b> . The information that you type in this data field will be generated on each CD that you process, eliminating the need to retype the information.
<b>Organization Goals</b> 	Allows you to enter default Organization Goals. The information that you type in this data field is generated on each CD you process, eliminating the need to retype the information. <b>Note:</b> You should always check the <b>Systems Default</b> information to be sure it is correct for the organizations for which you have responsibility.
<b>Save/Exit</b>	Once you have selected all the system defaults, click <Save> to save your information and return to the <b>Core Document Development System</b> window. <i>Or</i> Click <Exit> to return to the <b>Core Document Development System</b> window and not save your changes.

**Window Menu** The **Window** menu provides three choices for displaying open windows; you can arrange them according to your preference for viewing.

The **Window** menu also lists all windows you currently have open, including your sign-in “responsibility” (listed in the **Navigator** window).

To access the **Window** menu, click **Window** on the Main Menu Bar.



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## Accessing and Navigating in COREDOC, Continued

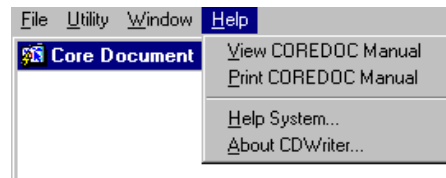
### Window Menu

Choice	Action
<b>C</b> ascade	Opens open windows in a “cascaded” or stair-step fashion.
<b>T</b> ile	Opens open windows in a “tile” (non-overlapping fashion).
<b>A</b> rrange <b>I</b> cons	Arranges the icons of any minimized windows side-by-side in the lower left of the window.

### Help Menu

The **H**elp Menu provides Help System Maintenance entries and general information About CD Writer.

To access the **H**elp menu, click **H**elp on the Main Menu.



Menu Item	Description
<b>V</b> iew <b>C</b> OREDOC <b>M</b> anual	Provides a view of COREDOC Manual from Integrated Personnel Process Improvement (PPI) release.
<b>P</b> rint <b>C</b> OREDOC <b>M</b> anual	Prints the COREDOC Manual from the Integrated PPI COREDOC manual on-line without exiting.
<b>H</b> elp <b>S</b> ystem	Provides general information about the purpose and functionality contained in the COREDOC software.
<b>A</b> bout <b>C</b> D <b>W</b> riter	Provides general information about the CD Writer COREDOC software.

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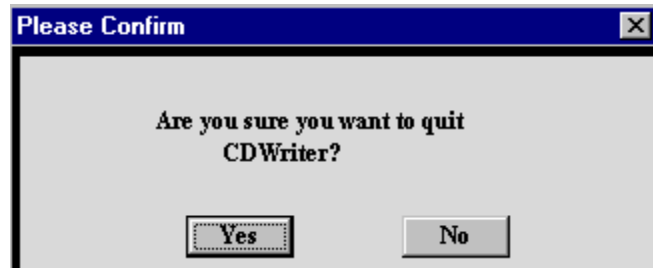
## Accessing and Navigating in COREDOC, Continued

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### Exiting COREDOC

There are a number of methods to exit COREDOC:

- Click <**E**xit> from any of the application windows, and follow the directions on the windows to continue the exiting process, or
- Click **F**ile on the Main Menu; click **E**xit. A **Dialog Box** opens.



- Click <**Y**es> to exit CD Writer and return to the **Navigator** window.
  - Click <**N**o> to return to the **Coredoc Applications** window.
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# Creating a Core Document


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**Purpose** This procedure provides information on the process of creating, viewing, and printing a new core document (CD).

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- Section Contents**
- Accessing the COREDOC Applications window
  - Selecting an Occupational Series
  - Naming Core Documents
  - Selecting:
    - Duties for a Regular CD
    - Supplementary Duties for a Regular CD
    - Percentages of Time for a Regular CD
    - Staffing KSAs for a Regular CD
  - Verifying Title, Pay Plan, Series and Grade for a Regular CD
  - Completing Organizational Goals and Purpose for a Regular CD
  - Developing the Performance Management Plan for a Regular CD
    - Using the System-Generating Performance Requirements
    - Entering New Performance Requirements
  - Creating a Standard CD
  - Viewing and Printing a CD
  - Exiting COREDOC
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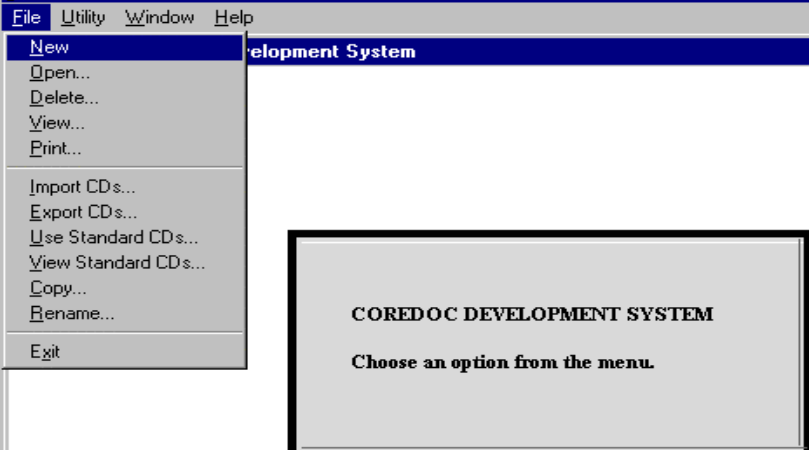
## Accessing the Coredoc Application window

Step	Action
1	<b>Navigation Path</b> ▢ <i>Coredoc</i> ▢ <Open>.
2	<p>The <b>Coredoc Applications</b> window opens. Click the&lt;OK&gt; button to display the <b>Core Document Development System</b> Title window briefly before The <b>Core Document Development System Main Menu</b> window with the Main Menu Bar opens.</p> 

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## Creating a Core Document, Continued

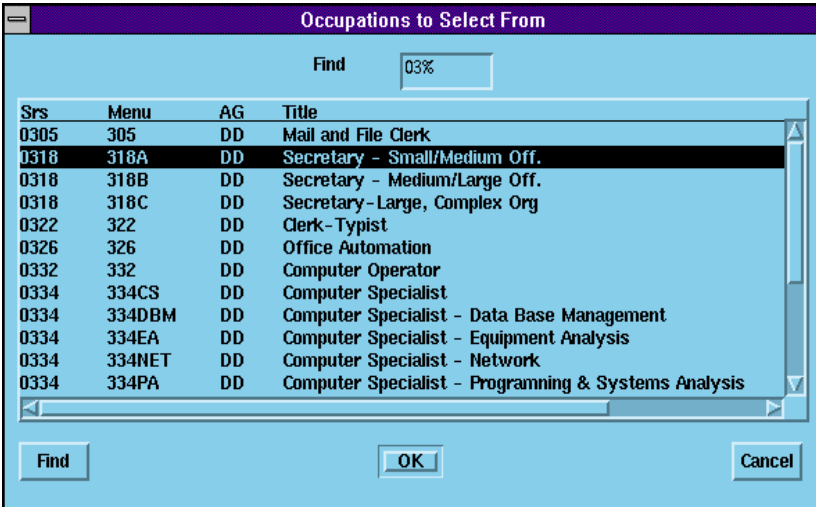

### Accessing the Coredoc Application window (continued)

Step	Action
3	<p>The <b>Core Document Development System</b> window with the Main Menu Bar opens.</p> <ul style="list-style-type: none"> <li>Click <b>F</b>ile to display a drop-down menu.</li> <li>Click <b>N</b>ew to begin the process of creating a core document.</li> </ul> 

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## Creating a Core Document, Continued

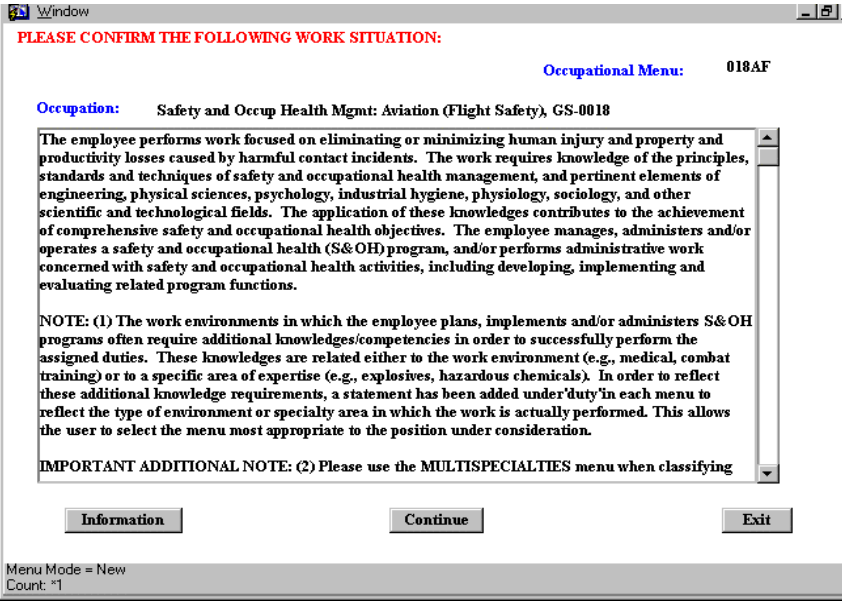
### Selecting an Occupational Series

Step	Action
1	<p>The <b>Occupations to Select From</b> window opens with three Taskflow Buttons at the bottom of the window.</p> <ul style="list-style-type: none"> <li>• Scroll and click the occupation you need for your CD, and then click <b>&lt;OK&gt;</b>, or</li> <li>• Input the Series number in the <b>Find</b> data area followed by a “%” Click <b>&lt;Find&gt;</b>. The series number you designated opens.</li> <li>• From the listing, click the series and occupation you need and click <b>&lt;OK&gt;</b>.</li> </ul>  <p> <b>Note:</b> Several series are further defined into a number of occupations. For example, 0318 has other associated occupations listed: 318A, 318B, etc.</p> <p>Additionally, several Primary Occupations require you to select duties from two or more occupational menus. This usually applies when two or more wage occupations of equivalent grade are used in the CD creation process. If you select one of these series you will be returned to the <b>Occupation to Select From</b> window where another series with an associated occupation may be selected.</p>

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## Creating a Core Document, Continued

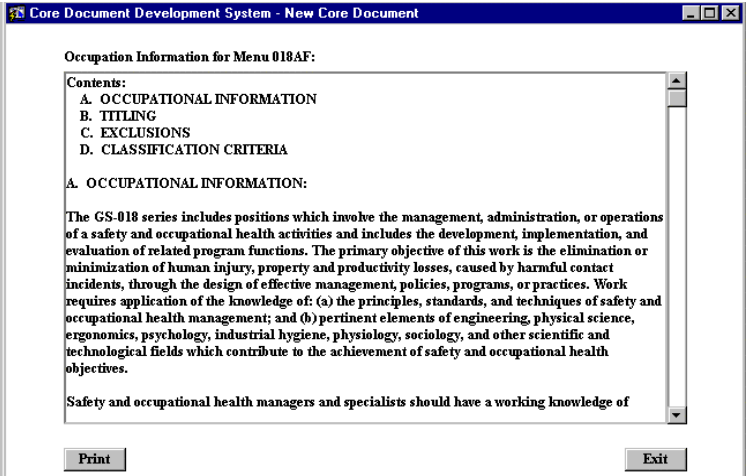
### Selecting an Occupational Series (continued)

Step	Action				
2	<p>The <b>Coredoc Document Development System – New Core Document</b> window with the title “Please Confirm The Following Work Situation” opens with a description of the occupation you selected. Use the scroll bar and scroll through the description to ensure it meets your needs.</p> 				
3	<p>Click one of the taskflow buttons at the bottom of the window:</p> <table border="1"> <tr> <td>Click <b>&lt;Information&gt;</b></td><td>Click <b>&lt;Continue&gt;</b></td></tr> <tr> <td>To display detailed position classification information about the selected series and occupation to read before proceeding.</td><td>To display the <b>Action - CD Type window</b> when the series and occupation are correct.</td></tr> </table>	Click <b>&lt;Information&gt;</b>	Click <b>&lt;Continue&gt;</b>	To display detailed position classification information about the selected series and occupation to read before proceeding.	To display the <b>Action - CD Type window</b> when the series and occupation are correct.
Click <b>&lt;Information&gt;</b>	Click <b>&lt;Continue&gt;</b>				
To display detailed position classification information about the selected series and occupation to read before proceeding.	To display the <b>Action - CD Type window</b> when the series and occupation are correct.				

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## Creating a Core Document, Continued

### Selecting an Occupational Series (continued)

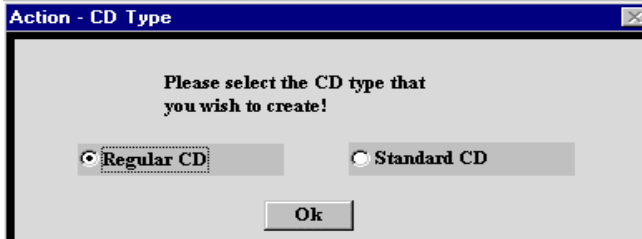


Step	Action
4	<p>If you click &lt;<b>Information</b>&gt;, the <b>Core Document Development System - New Core Document</b> window opens with detailed information about the selected series and occupation.</p> 
5	<p>Click &lt;<b>Print</b>&gt; to print the information on the occupation, or click &lt;<b>Exit</b>&gt; to return to the <b>Core Document Development System</b> window.</p>
6	<p>If you click &lt;<b>Continue</b>&gt; on the <b>Core Document Development System</b> window because the series and occupation are correct, the <b>Action – CD Type</b> window opens.</p> <p>Click &lt;<b>Exit</b>&gt; on the <b>Core Document Development System</b> window if the series and occupation are not correct to return to the <b>Core Document Development System Main Menu</b> window.</p>

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## Creating a Core Document, Continued

### Naming Core Documents

Follow the steps below to select or create your own unique CD.



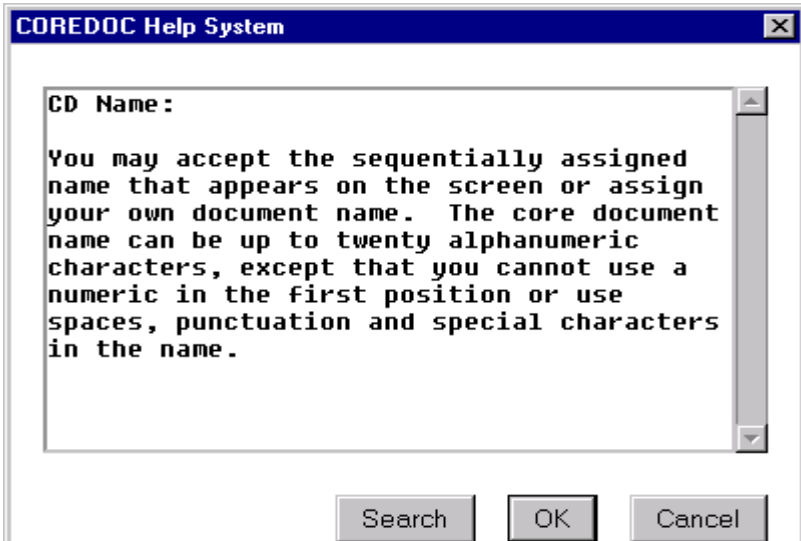
Step	Action
1	<p>Click &lt;Continue&gt; on the <b>Core Document Development System-New Core Document</b> window.</p> <p>The <b>Action - CD Type</b> Dialog Box opens.</p>  <p>Select one of the following types of CDs:</p> <ul style="list-style-type: none"> <li>• <b>Regular CD</b> - is based on unique duty requirements or special qualifications of the position. Regular CDs have a system-generated name beginning with “TMP” and ending with a sequential number.</li> <li>• <b>Standard CD</b> - is based on standard duties and qualifications and is normally used Component wide. Standard CDs will have a system-generated name comprised of four parts: <ul style="list-style-type: none"> <li>• The abbreviation, “STD,”</li> <li>• The user’s two-digit agency code,</li> <li>• The four-digit occupational series,</li> <li>• The two-digit grade, and</li> <li>• A sequential number.</li> </ul> </li> </ul> <p> <b>Note:</b> It is recommended that you establish your own naming convention for both “Regular” and “Standard” CDs. Your CDs are based on your Component’s business rules. You may enter any identifier that does not exceed the allocated space of twenty alphanumeric characters.</p>
2	<p>Click <b>Regular CD</b> on the <b>Action – CD Type</b> window and click &lt;OK&gt;.</p> <p> <b>Note:</b> A Regular CD is used for illustration purposes only.</p>

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## Creating a Core Document, Continued

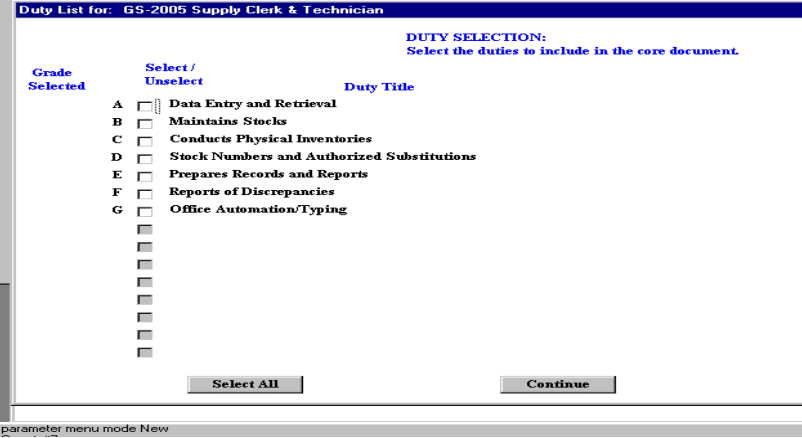


### Naming Core Documents (continued)

Step	Action
3	<p>The <b>Action – Enter CD Name</b> window opens. In the example, a system-generated CD Name of “TMP00789” opens in the <b>CD Name</b> data field.</p>  <p> <b>Note:</b> Click &lt;Help&gt; for the <b>COREDOC Help System</b> window to display an explanation of the CD Name.</p> 
4	Click <Ok> to accept the system-generated <b>CD Name</b> , or type in your own specific name and number for the CD that meets the business rules of your Component.
5	Click <OK> to display the <b>Duty List</b> window with the associated duties for the series and occupation you selected.
6	Click <Cancel> to cancel to exit the window.

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## Creating a Core Document, Continued

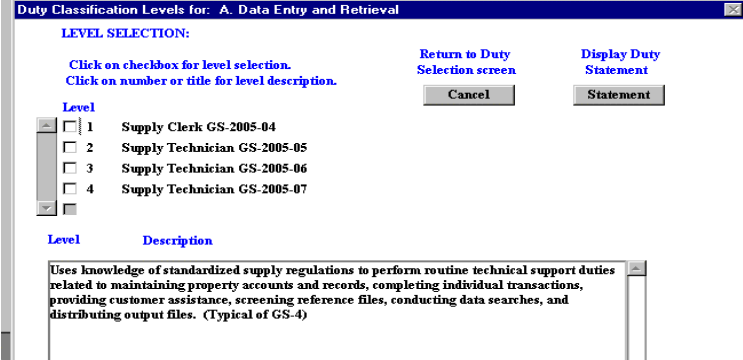

### Selecting Duties for a Regular CD

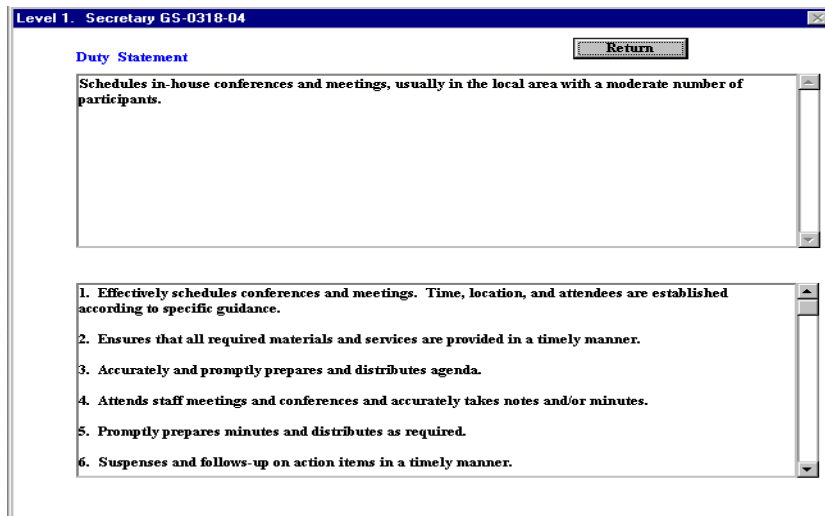
Step	Action
1	<p>On the <b>Duty List for:...</b> window, select the duties to include in your CD at this time.</p>  <p> <b>Note:</b> It is not necessary to select all the duties listed for your series and occupation, only the ones that applies to your CD.</p>
2	<p>Click <b>&lt;Select All&gt;</b> to select all the duties listed for the series and occupation.</p> <p><i>OR</i></p> <p> Click <b>&lt;Continue&gt;</b> to <b>not</b> select any duties.</p> <p><b>Note:</b> If you click <b>&lt;Continue&gt;</b>, a dialog box opens. “You have NOT selected any duties for this series.” Click <b>&lt;OK&gt;</b>. A second dialog box opens, “Do you wish to abandon this series for this CD?” Click <b>&lt;Yes&gt;</b> to begin a new series or <b>&lt;No&gt;</b> to return to the <b>Duty List for:</b> window.</p> <p>Click the box next to the <b>Duty Title</b> associated with your series and occupation to display the <b>Duty Classification Levels For:...</b> window. For Example: <b>Duty Classification Levels For: A Data Entry and Retrieval</b> window.</p>

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## Creating a Core Document, Continued

### Selecting Duties for a Regular CD (continued)

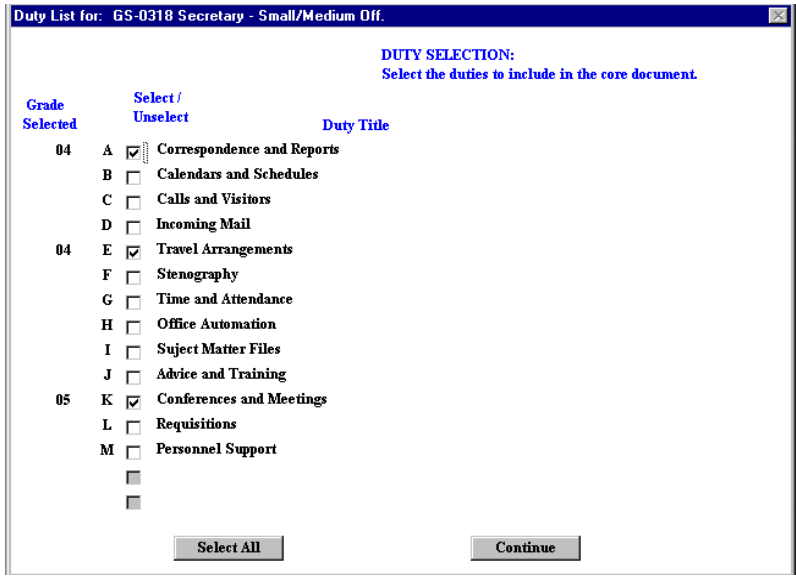
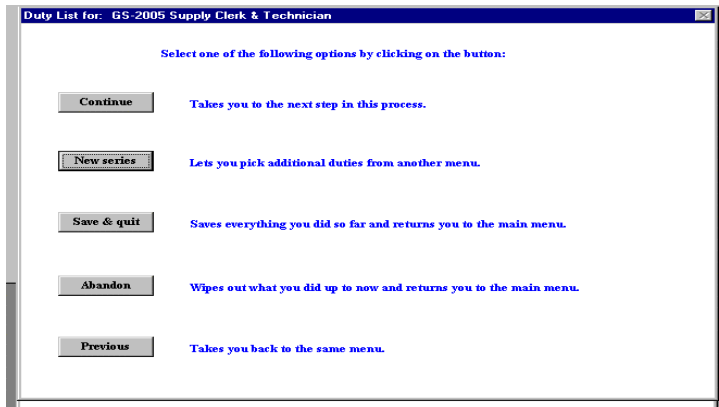
Step	Action
3	<p>The <b>Duty Classification Levels for: A Data Entry and Retrieval</b> window opens a description of the first level for the series listing in the Level Selections Area.</p>  <p> <b>Notes:</b></p> <ul style="list-style-type: none"> <li>Click the Title or Series (i.e., Supply Technician, GS-2005-06) to access the Level/Description for each of the levels. Or</li> <li>Click &lt;<b>Cancel</b>&gt; to return to the <b>Duty List for:</b> window without making a Duty Level selection.</li> </ul>
4	Click the level you need for your CD. The <b>Duty List for:</b> window returns for selecting additional duties. Select another duty.
5	Click < <b>Statement</b> > to display the <b>Duty Statement</b> window.



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## Creating a Core Document, Continued





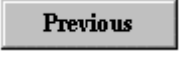




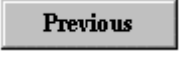




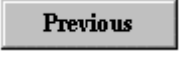

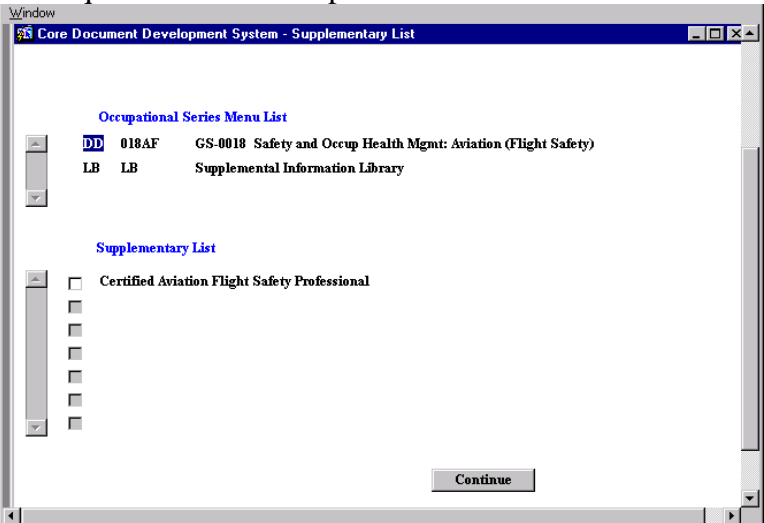
### Selecting Duties for a Regular CD (continued)

Step	Action
6	Click < <b>Return</b> > to return to the <b>Level Selection</b> window. Select the level appropriate for the duty position. The system will return to the <b>Duty Selection</b> window.
7	<p>After you have selected the last Duty Title, the appropriate <b>Duty List For:</b> window opens with the Grade Selected Column and checkboxes completed and checked.</p> 
8	<p>Click &lt;<b>Continue</b>&gt; to display the <b>Duty List for:</b> window.</p> 

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## Creating a Core Document, Continued

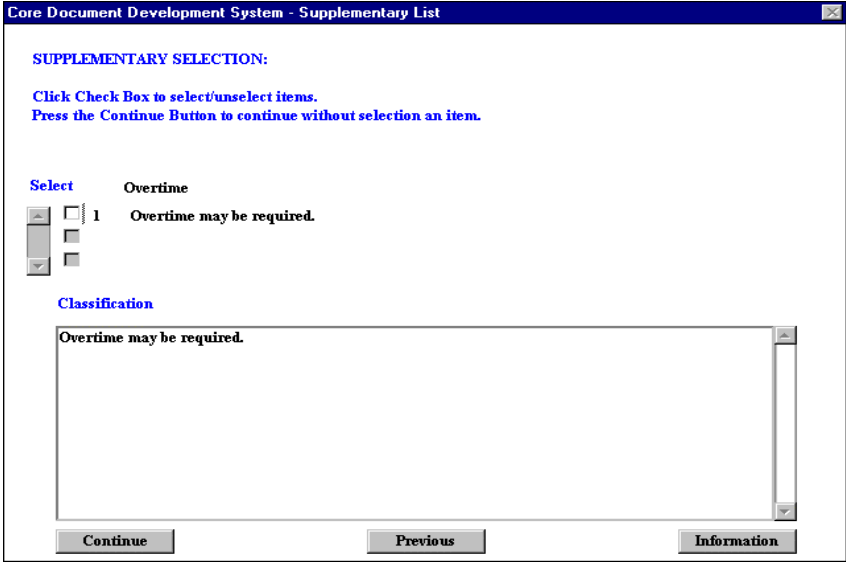
### Selecting Duties for a Regular CD (continued)

Step	Action												
8 (cont)	<p>A description and the use of the buttons</p> <table border="1"> <thead> <tr> <th>Button</th><th>Description/Use</th></tr> </thead> <tbody> <tr> <td></td><td>Proceed to the next creation window.</td></tr> <tr> <td></td><td>Return to the <b>Occupations to Select From</b> window to select a new series.</td></tr> <tr> <td></td><td>Save your work up to this point and quit.</td></tr> <tr> <td></td><td>Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the <b>Core Document Development Window</b>.</td></tr> <tr> <td></td><td>Return to the Duty List window.</td></tr> </tbody> </table>	Button	Description/Use		Proceed to the next creation window.		Return to the <b>Occupations to Select From</b> window to select a new series.		Save your work up to this point and quit.		Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the <b>Core Document Development Window</b> .		Return to the Duty List window.
Button	Description/Use												
	Proceed to the next creation window.												
	Return to the <b>Occupations to Select From</b> window to select a new series.												
	Save your work up to this point and quit.												
	Exit your work without saving. A series of dialog boxes display. Click the correct response and return to the <b>Core Document Development Window</b> .												
	Return to the Duty List window.												
9 	<p>Click &lt;Continue&gt; to proceed. The <b>Core Document Development System - Supplementary List</b> window opens for selecting additional duties.</p> <p><b>Note:</b> These duties do not affect the grade or series, but are important to ensure requirements are complete for the CD.</p> 												

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## Creating a Core Document, Continued

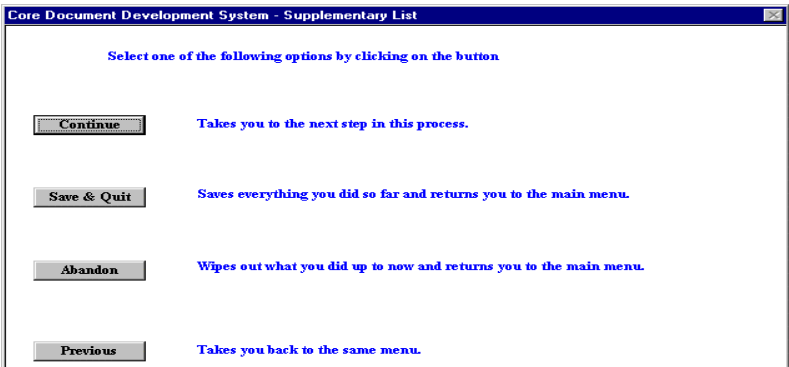

### Selecting Supplementary Requirements for a Regular CD

Step	Action
1	<p>Click the Select box to select a level or click &lt;Continue&gt; to return to the <b>Duty List</b>.</p> 
2	<ul style="list-style-type: none"> <li>Click &lt;Previous&gt; to select additional supplementary duties.</li> <li>Click &lt;Information&gt; for information about the window.</li> </ul>
3	<p>Click &lt;Continue&gt; after you select all the supplementary duties for COREDOC to display another <b>Supplementary List</b> window.</p> <p>OR</p> <p>Click &lt;Continue&gt;, even if you did not make any selections.</p>

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## Creating a Core Document, Continued

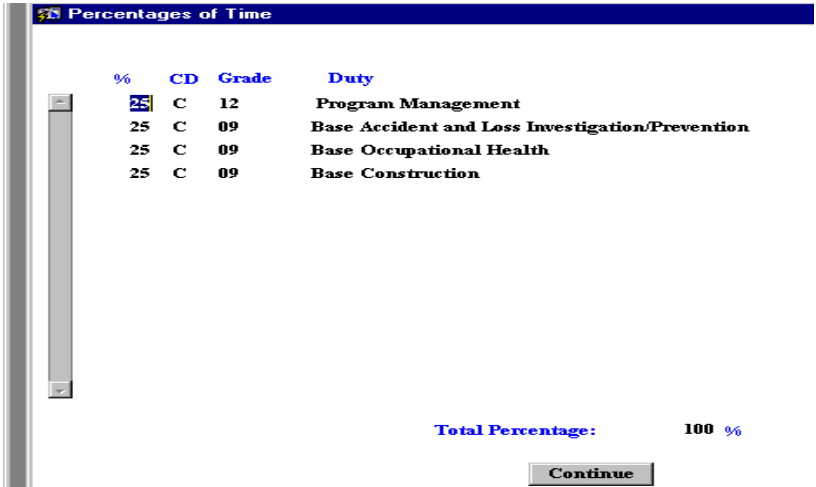
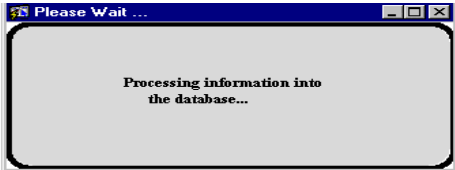
### Selecting Supplementary Requirements for a Regular CD (continued)

Step	Action
4	<p>The <b>Core Document Development System – Supplementary List</b> window opens. Each of the four options is explained in the text. Click the option that meets your needs to continue the COREDOC process.</p> 
5	<p>Click &lt;<b>Continue</b>&gt; to display the <b>Percentages of Time</b> window.</p> <p> <b>Note:</b> If you did not select any of the supplementary duties, a dialog box asks, “Are you finished with Supplementary Information?”</p> <p>Click &lt;<b>YES</b>&gt; to continue creating a CD.</p>

*Continued on next page*

## Creating a Core Document, Continued

### Selecting Percentages of Time

Step	Action
1	<p>The <b>Percentages of Time</b> window opens with the duties you selected with an assigned percent for each one. COREDOC automatically distributes percentages to equal a total of 100% unless you make adjustments. Total Percentage is displayed at the bottom of the screen and must always equal 100%.</p>  <p><b>Note:</b> You may change the percentage of time, if needed. Click the box under “%” and type in a new percentage. The total percentage must add up to 100 percent.</p>
2	Click < <b>Continue</b> > to display the <b>Staffing KSAs</b> window.
3	<p>The <b>Please Wait</b> Dialog Box advises, “Processing information into the database...” before accessing the next step in the COREDOC process.</p> 

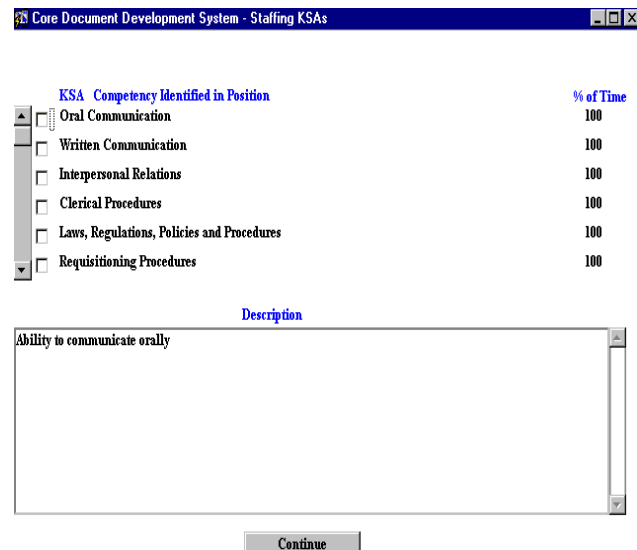

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## Creating a Core Document, Continued

### Selecting Staffing KSAs


All of the competencies listed appear in the CD in the **Basic Training Competencies** Section. Only those you select for staffing, however, will be listed in the selected **Staffing KSAs** section of COREDOC.

Step	Action
1	<p>The <b>Core Document Development System – Staffing KSAs</b> window opens.</p>  <p>Click the checkbox next to each KSA for the position description. As you select a KSA, the system will take you to the description for that KSA until you have selected all the KSAs that you need. The KSAs will populate in the <i>Description</i> field.</p> <p> <b>Notes:</b></p> <ul style="list-style-type: none"> <li>• The <b>KSA</b> Checkboxes will usually be blank. If there are check marks in them, a pre-determination has been made that the KSAs are essential to both staffing and training.</li> <li>• Numbers in the <b>% of Time Column</b> indicate the percentage of work requiring the particular competency (KSA).</li> <li>• If the competency applies to all KSAs selected, then the percentage is 100. If the competency applies to only one duty and that duty comprises 30% of the job, then the % of time will be 30.0. The <b>% of Time Column</b> opens to assist in deciding which KSAs to select for staffing.</li> </ul>
2	<p>Click &lt;<b>Continue</b>&gt; to display the <b>Title, Pay Plan, Series, Grade</b> window after you have selected all the KSAs you need for the CD.</p>

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## Creating a Core Document, Continued

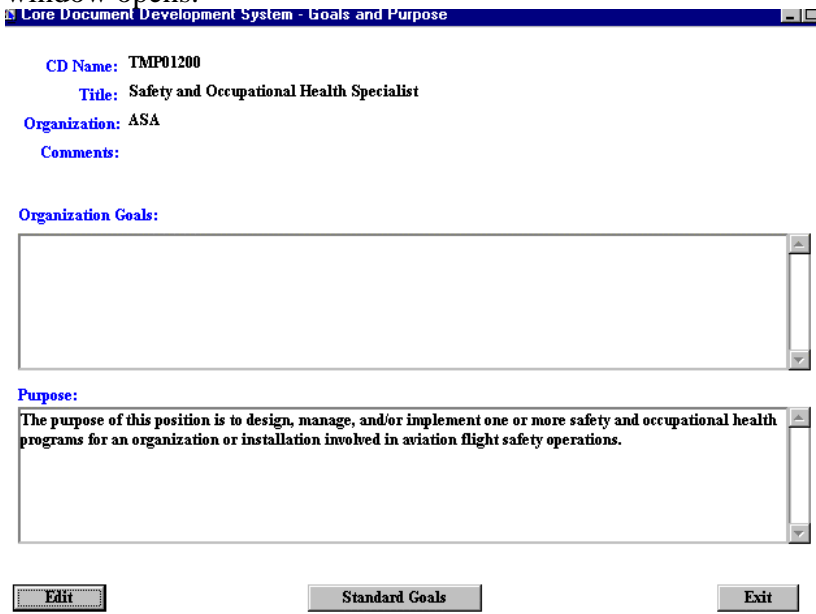
### Verifying Title, Pay Plan, Series, and Grade for a Regular CD

Step	Action
1	<p>The <b>Core Document Development System – Title, Pay Plan, Series, Grade</b> window opens. The window contains the <b>CD Name</b>, <b>Official Title</b>, <b>Series</b>, <b>Pay Plan</b>, and <b>Grade</b> data fields. These are automatically populated based on your previous selections in the creation process.</p>  <ul style="list-style-type: none"> <li>Click &lt;<b>Edit</b>&gt; and highlight selection to change the <b>Official Title</b>, <b>Series</b>, or <b>Pay Plan</b>. Any changes made on this window will be reflected in the Classification Summary of the CD. <b>CD Name</b> cannot be changed.</li> <li>Click <b>Title</b> to make any changes to the Official Title.</li> <li>Click &lt;<b>Continue</b>&gt; to go to the next step and display the <b>Goals and Purpose</b> window.</li> </ul>

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## Creating a Core Document, Continued

### Completing the Organizational Goals And Purpose for a Regular CD

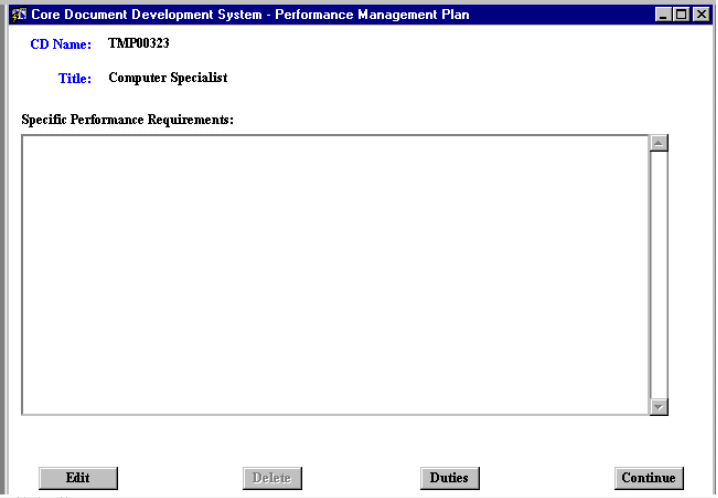
Step	Action									
1	<p>The <b>Core Document Development System – Goals and Purpose</b> window opens.</p> 									
2	<table><tr><th>If you</th><th>Then</th></tr><tr><td>Choose to write your own Organizational Goals and Purpose.</td><td>Click <b>&lt;Edit&gt;</b> and type them in the fields provided. Click <b>Save</b>. Click <b>&lt;Exit&gt;</b> The <b>Performance Management Plan</b> window will display.</td></tr><tr><td>Choose to use Standards Goals. (<b>Note:</b> Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)</td><td>Click <b>&lt;Standard Goals&gt;</b> for auto population. Click <b>&lt;Exit&gt;</b>. The <b>Performance Management Plan</b> window will display.</td></tr><tr><td>Choose not to input Goals and Purpose.</td><td>Click <b>&lt;Exit&gt;</b>. The <b>Performance Management Plan</b> window will display.</td></tr></table>	If you	Then	Choose to write your own Organizational Goals and Purpose.	Click <b>&lt;Edit&gt;</b> and type them in the fields provided. Click <b>Save</b> . Click <b>&lt;Exit&gt;</b> The <b>Performance Management Plan</b> window will display.	Choose to use Standards Goals. ( <b>Note:</b> Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)	Click <b>&lt;Standard Goals&gt;</b> for auto population. Click <b>&lt;Exit&gt;</b> . The <b>Performance Management Plan</b> window will display.	Choose not to input Goals and Purpose.	Click <b>&lt;Exit&gt;</b> . The <b>Performance Management Plan</b> window will display.	
If you	Then									
Choose to write your own Organizational Goals and Purpose.	Click <b>&lt;Edit&gt;</b> and type them in the fields provided. Click <b>Save</b> . Click <b>&lt;Exit&gt;</b> The <b>Performance Management Plan</b> window will display.									
Choose to use Standards Goals. ( <b>Note:</b> Users with “Classifier” or “Super User” role can establish “Standard Goals” as a default for the organizations serviced.)	Click <b>&lt;Standard Goals&gt;</b> for auto population. Click <b>&lt;Exit&gt;</b> . The <b>Performance Management Plan</b> window will display.									
Choose not to input Goals and Purpose.	Click <b>&lt;Exit&gt;</b> . The <b>Performance Management Plan</b> window will display.									

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## Creating a Core Document, Continued

### Developing the Performance Management Plan for a Regular CD

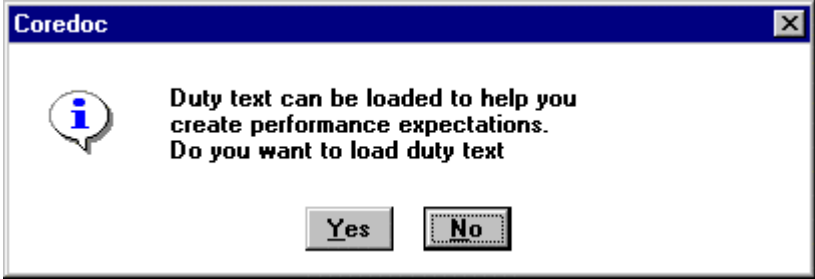
COREDOC is programmed to reconfigure the duties selected into objectives for use in the **Performance Management Plan** window. It will format the duty statements (objectives) to emulate your component's current performance management plan. The window is essentially the same for each Component; however, the output will be different depending on your Component. For example, Air Force does not use this part of COREDOC. Follow these steps to develop the Performance Management Plan:

Step	Action
1	<p>The <b>Core Document Development System – Performance Management Plan</b> window opens.</p>  <p>There are four Taskflow Buttons on the window. The descriptions of the buttons follow.</p> <ul style="list-style-type: none"> <li>&lt;<b>Edit</b>&gt; - Add or change text to comply with your Component's governing performance elements and standards.</li> <li>&lt;<b>Delete</b>&gt; - Remove text from the document.</li> <li>&lt;<b>Duties</b>&gt; - Load duty statements associated with the CD.</li> <li>&lt;<b>Continue</b>&gt; - Continue the creation process.</li> </ul> <p>Click &lt;<b>Duties</b>&gt; to display the <b>Core Document Development</b> window.</p>

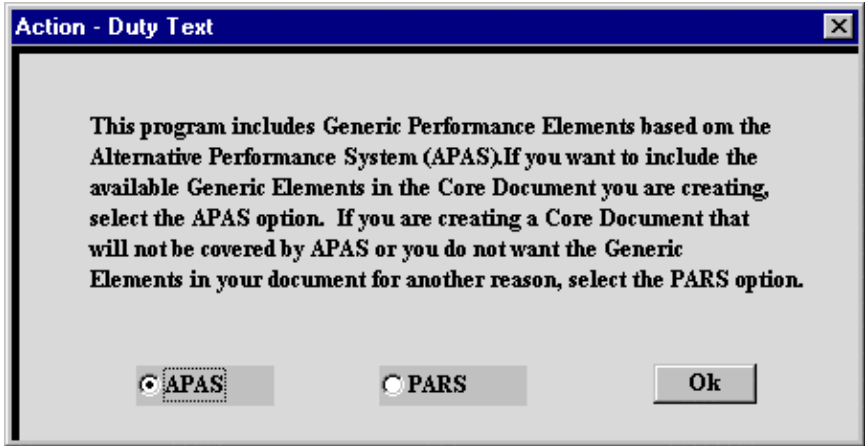
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## Creating a Core Document, Continued

### Developing the Performance Management Plan for a Regular CD (continued)

Step	Action		
2	A Duty Text Dialogue Box opens:		
			
3	Click <Yes> if you	Click <No> if you	
	Want the system to load performance requirements.	Want to enter your own performance requirements.	

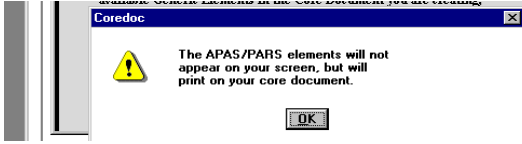
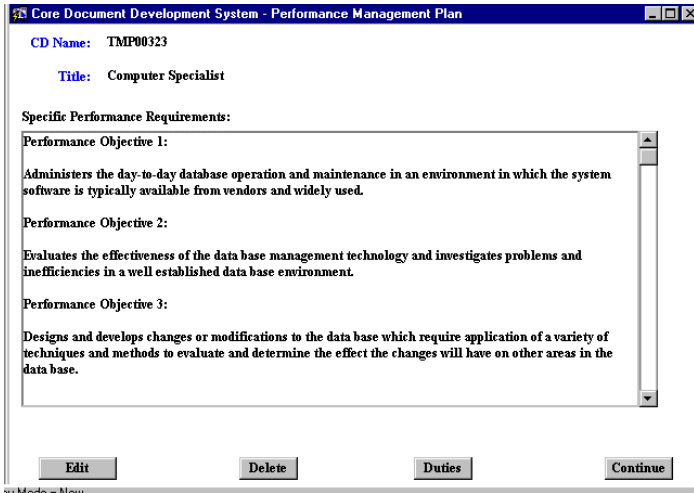
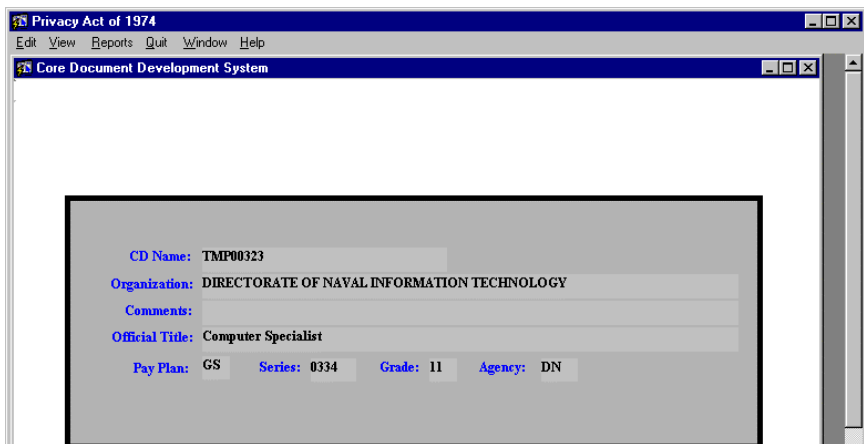
### Using the System-Generated Performance Requirements

Step	Action
1	<p>If you click &lt;Yes&gt;, a Duty Text Dialogue Box opens.</p> 

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## Creating a Core Document, Continued

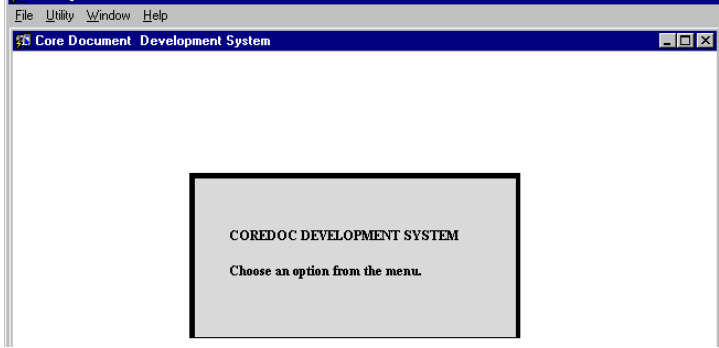
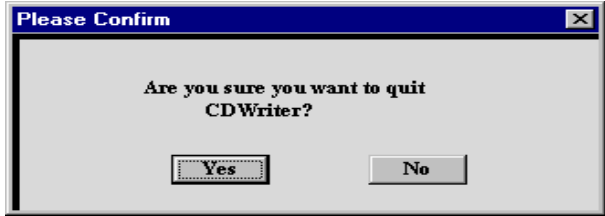
### Using the System-Generated Performance Requirements (continued)

Step	Action
2	<p>Click &lt;OK&gt;. A notice opens.</p> 
3	<p>Click &lt;OK&gt;.</p> 
4	<p>Click &lt;Continue&gt;. The <b>Core Document Development System - Performance Management Plan</b> window opens. This window provides the <i>CD Name</i>, <i>Organization</i>, <i>Comments</i>, <i>Official Title</i>, <i>Pay Plan</i>, <i>Series</i>, <i>Grade</i>, and <i>Agency</i> fields with your input.</p> 

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## Creating a Core Document, Continued

### Using the System-Generated Performance Requirements (continued)

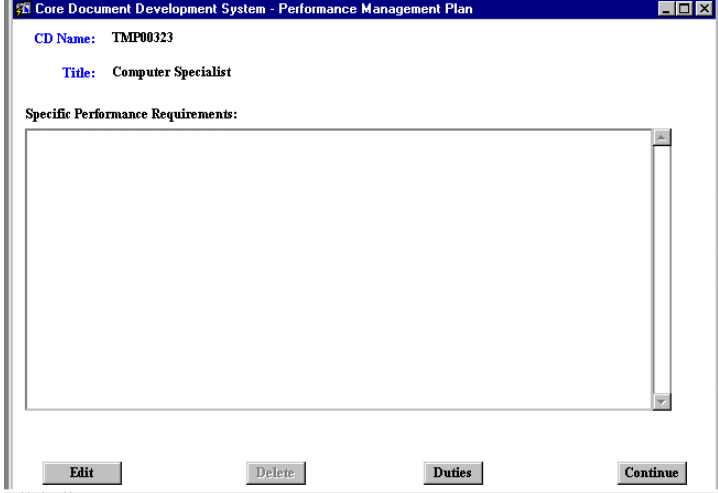
Step	Action
5	Click <Edit>. Click <b>Exit</b> .
6	<p>The <b>Core Document Development System</b> window opens.</p> 
7	Click <b>File</b> . Click <b>Exit</b> .
8	<p>The Please Confirm window will display the question “Are you sure you want to Quit CD Writer?”</p> 
9	Click <Yes> to exit.

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## Creating a Core Document, Continued

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### Entering New Performance Requirements

Step	Action
1	<p>If you clicked &lt;No&gt; in Step 3 of Developing the Performance Management Plan above, the <b>Core Document Development System - Performance Management Plan</b> window opens with the <b>Specific Performance Requirements Section</b> blank.</p>  <p>Click &lt;Edit&gt;.</p>

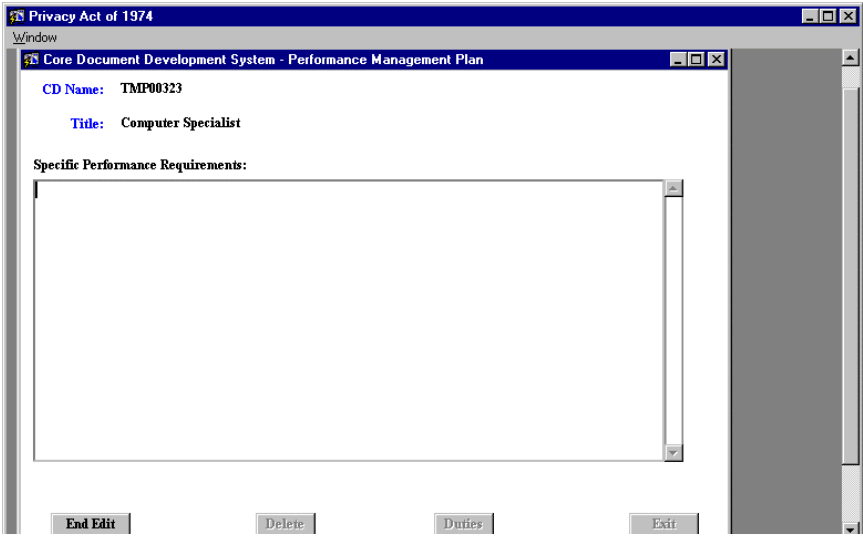
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## Creating a Core Document, Continued

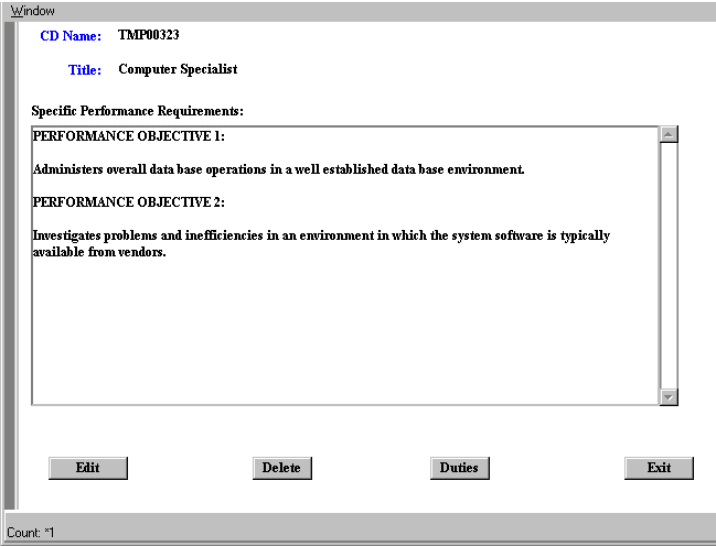
### Entering New Performance Requirements (continued)

Step	Action
2	<p>The <b>Core Document Development System - Performance Management Plan</b> window opens with <b>Specific Performance Requirements</b> blank.</p>  <p>Type the specific performance requirements. Click &lt;<b>End Edit</b>&gt;.</p>

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## Creating a Core Document, Continued

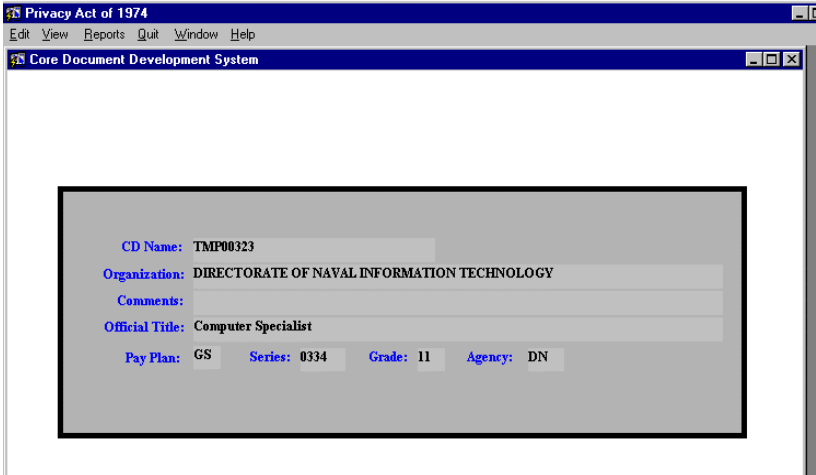
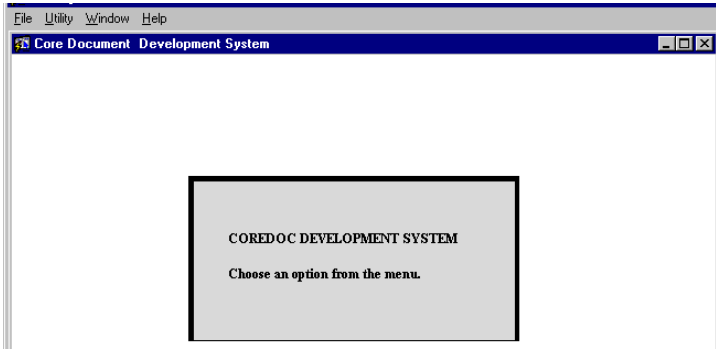
### Entering New Performance Requirements (continued)

Step	Action
3	<p>The <b>Core Document Development System - Performance Management Plan</b> window opens with your input.</p> 
4	Click <Exit>.

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## Creating a Core Document, Continued

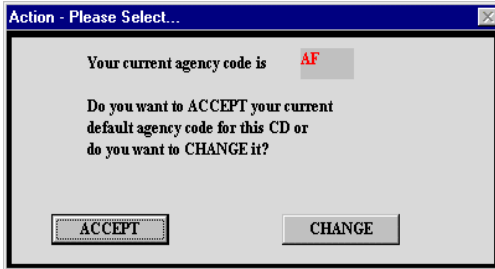
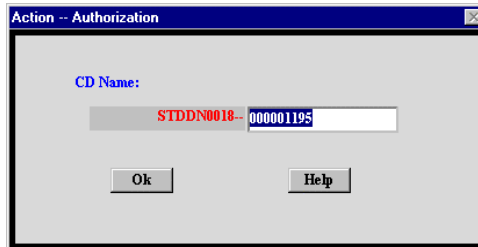
### Entering New Performance Requirements (continued)

Step	Action
5	<p>The <b>Core Document Development System</b> window opens. This window provides the <i>CD Name</i>, <i>Organization</i>, <i>Comments</i>, <i>Official Title</i>, <i>Pay Plan</i>, <i>Series</i>, <i>Grade</i>, and <i>Agency</i> fields with your input.</p> 
6	Click <b>Edit</b> . Click <b>Exit</b> .
7	<p>The <b>Core Document Development System</b> window opens.</p> 
8	Click <b>File</b> . Click <b>Exit</b> to exit COREDOC.

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## Creating a Core Document, Continued

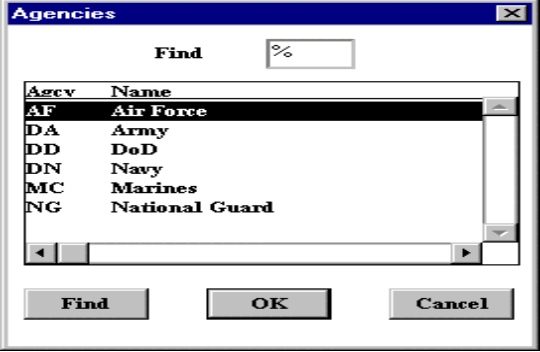

### Creating a Standard CD

Step	Action	
1	<p>The <b>Action – Please Select</b> window opens with two Taskflow Buttons and the statement “Your current agency code is _____. Do you want to accept your current default agency code for this CD or do you want to CHANGE it?”</p> 	
2	<b>If you click</b>	<b>Then</b>
	<Accept>	<p>The <b>Action – Authorizations</b> window opens and the system defaults to the agency code shown on the window. Two buttons are on the bottom of the screen:</p> <p>&lt;OK&gt; - Opens the <b>Duty List For: (Pay Plan, Series, Job Title)</b> Window in the block titled “Selecting from the Duty List”.</p> <p>&lt;Help&gt; - takes you to the <b>COREDOC Help System</b> Window on Standard CDs shown in this decision-logic table.</p> 

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## Creating a Core Document, Continued

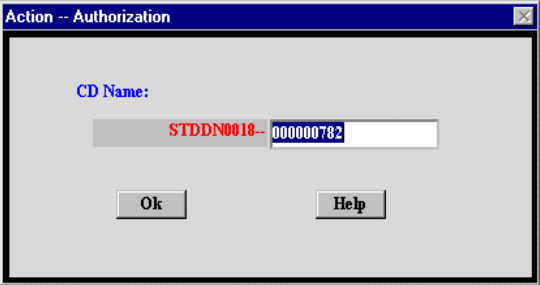
### Creating a Standard CD (continued)

Step	Action	
2 (cont)	<b>If you click</b>	<b>Then</b>
	<Change>	<p>The <b>Agencies</b> window opens with three Taskflow Buttons used in all queries.</p> 
	your <b>Agency and Name and</b> click <OK>	<p>The <b>Action – Default Agency</b> window opens with your Component listed in the default agency field.</p> 

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## Creating a Core Document, Continued

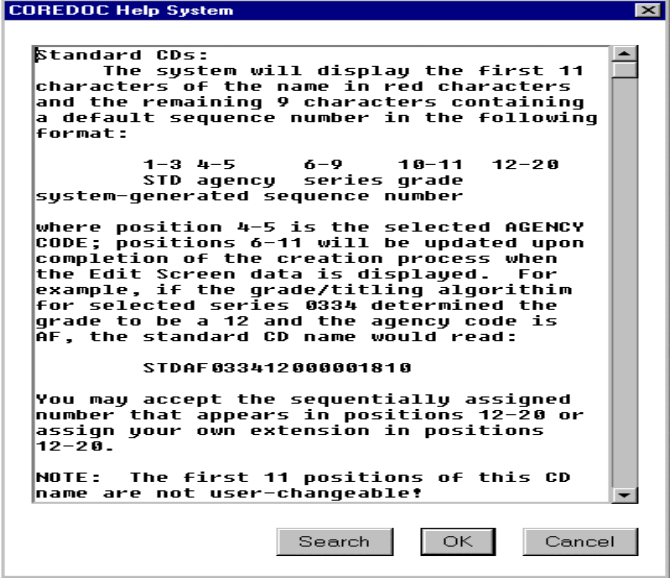
### Creating a Standard CD (continued)

Step	Action	
2 (cont)	<b>If you click</b>	<b>Then</b>
	<Ok>	<p>The <b>Action – Authorization</b> window opens with the <i>CD Name</i> field auto populated. Two buttons are on the bottom of the window:</p> <p>&lt;Ok&gt; - Opens the <b>Core Document Development System</b> window.</p> <p>&lt;Help&gt; - Opens the <b>COREDOC Help System</b> Window on Standard CDs shown in the next step.</p> 

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## Creating a Core Document, Continued

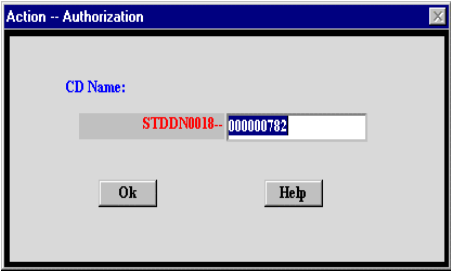
### Creating a Standard CD (continued)

Step	Action	
2 (cont)	If you click	Then
	<Help>	<p>The <b>COREDOC Help System</b> window opens with the sequentially assigned number. Three buttons are located on the window:</p> <p>&lt;Search&gt; - Opens the <b>Search/Replace</b> window to make changes and give you an explanation of the characters that constitute the Standard CD.</p> <p>&lt;OK&gt; - Opens the next window.</p> <p>&lt;Cancel&gt;- Returns you to the previous window.</p> 

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## Creating a Core Document, Continued

### Creating a Standard CD (continued)

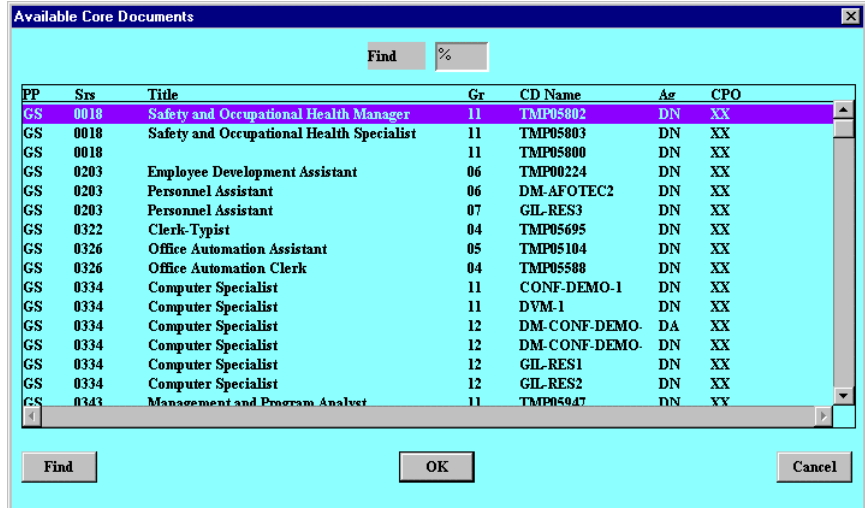
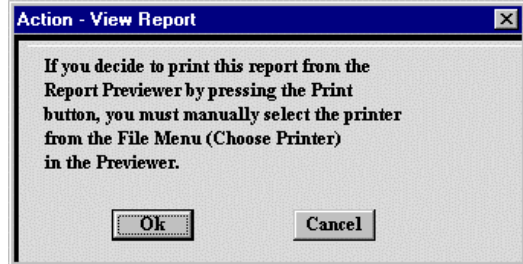
Step	Action	
2 (cont)	<b>If you click</b>	<b>Then</b>
	<Cancel>	<p>You are returned to the <b>Action – Authorization</b> window. Click &lt;Ok&gt; and continue with the Standard CD.</p> 

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## Creating a Core Document, Continued

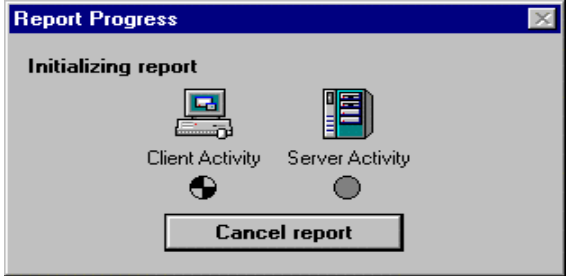
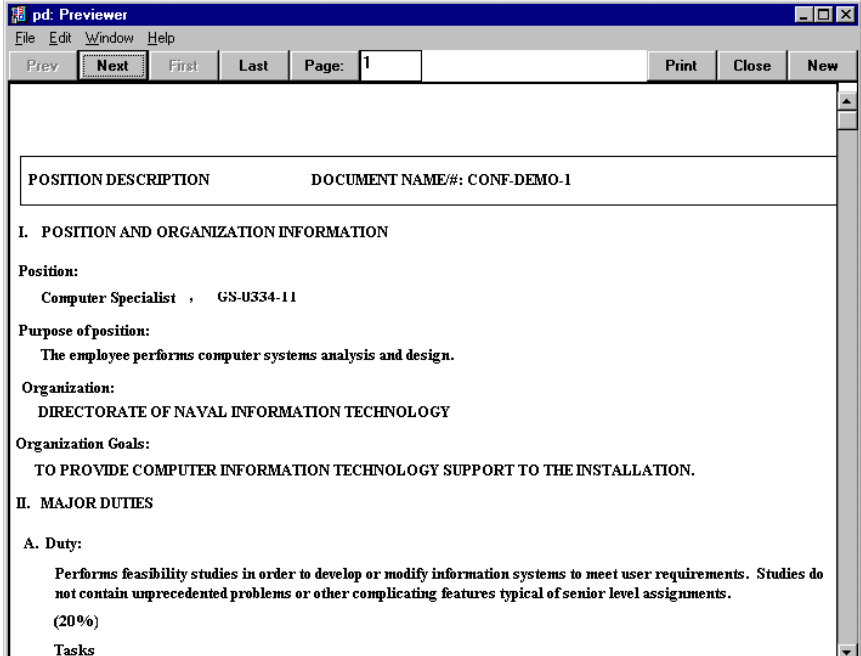

### Viewing and Printing a CD

Step	Action
1	Click <b>File</b> and then click <b>View</b> on the Main Menu Bar.
2	<p>The <b>Available Core Documents</b> window opens</p> 
3	Select the CD you wish to preview.
4	Click <b>&lt;OK&gt;</b> .
5	<p>The <b>Action – View Report</b> Dialog Box opens with the statement, “If you decide to print this report from the Report Previewer by pressing the Print button, you must manually select the printer from the File Menu (Choose Printer) in the Previewer.”</p> <p>Click <b>&lt;Ok&gt;</b>.</p> 

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## Creating a Core Document, Continued

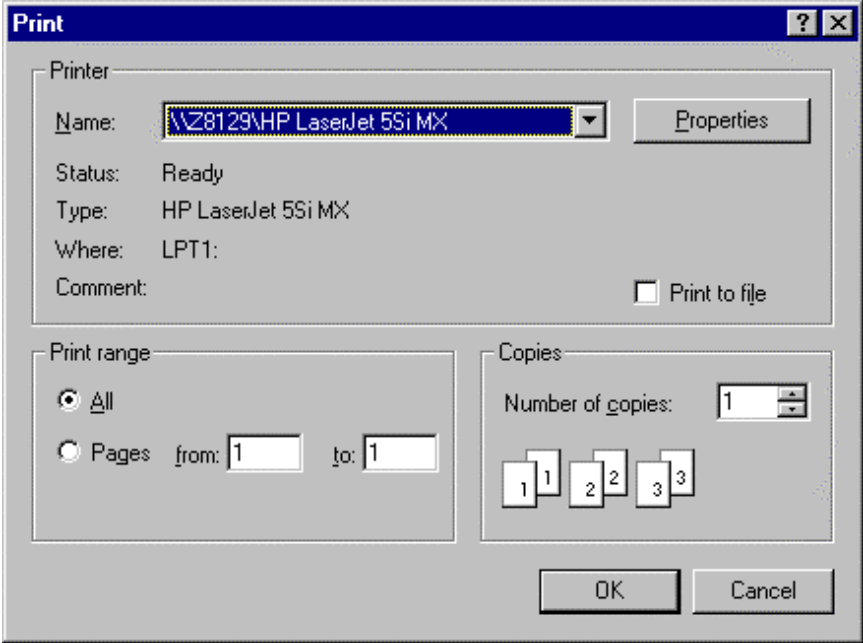
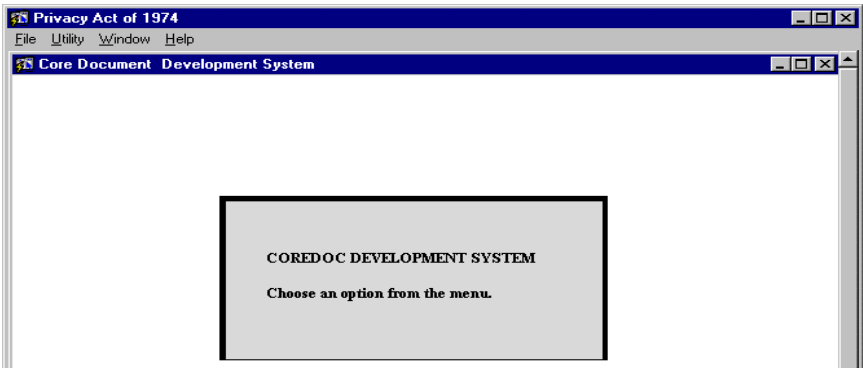
### Viewing and Printing a CD (continued)

Step	Action
6	<p>The <b>Report Progress</b> Dialog Box opens informing you that the activity is processing.</p> 
7	<p>The <b>pd: Previewer</b> window opens with a menu bar, eight buttons, a page indicator, and a scroll bar.</p>  <p> <b>Note:</b> You can preview the first page of the CD by using the scroll bar on the side. If you want to preview the rest of the CD, click &lt;Next&gt; until you get to the last page.</p>

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## Creating a Core Document, Continued

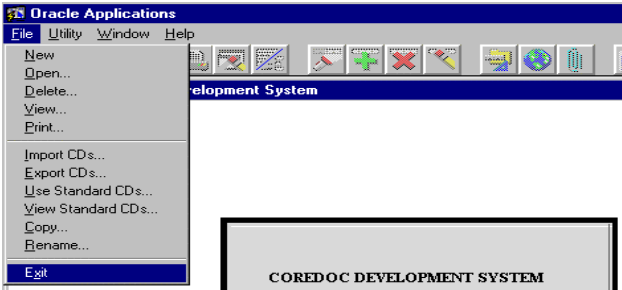
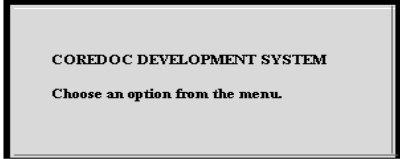
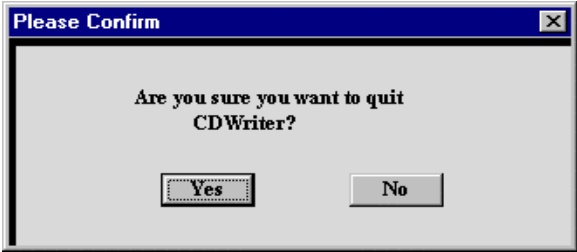
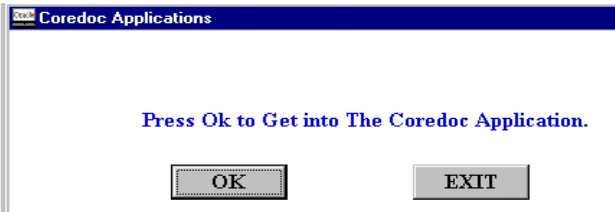
### Viewing and Printing a CD (continued)

Step	Action
8	<p>Click <b>File</b>. Click <b>Print</b>. The <b>Print</b> window opens.</p> 
9	<p>Select the appropriate printer in Printer <i>Name</i> data field. Select the Print Range and number of copies needed. Click <b>&lt;OK&gt;</b> to print the number of copies needed.</p>
10	<p>Click <b>&lt;Close&gt;</b> to return to the <b>Core Document Development System</b> window.</p> 

*Continued on next page*

## Creating a Core Document, Continued

### Exiting COREDOC

Step	Action
1	<p>Click <b>E</b>dit on the Main Menu Bar.</p> <p>The <b>COREDOC DEVELOPMENT SYSTEM</b> Dialog box opens with a new Toolbar.</p> <p>Click <b>F</b>ile and click <b>E</b>xit from the drop down menu.</p>  
2	<p>The <i>Please Confirm</i> Dialog Box opens asking, “Are you sure you want to quit CD Writer?”</p> <p>Click &lt;Yes&gt;.</p> 
3	<p>The <b>Coredoc Applications</b> window opens.</p>  <p>Click &lt;EXIT&gt;.</p>
4	The <b>Navigator</b> window opens.

# Viewing and Printing an Existing Core Document

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**Purpose** This section explains how to access **COREDOC** to view and print an existing CD.

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**Section Contents**

- Accessing COREDOC
- Viewing a CD
- Printing a CD

---



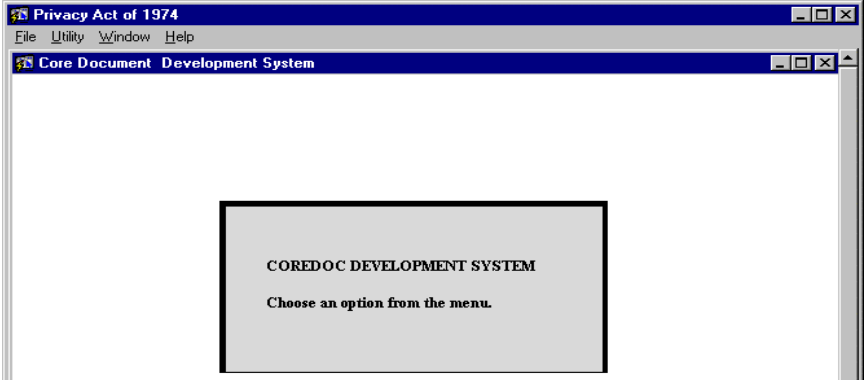
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## Accessing COREDOC

Step	Action
1	From the <b>Responsibilities</b> window, click your assigned Responsibility ▢ <OK>.
2	The <b>Navigator List</b> opens. Click <i>Coredoc</i> ▢ <O <u>pen</u>

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## Viewing a CD

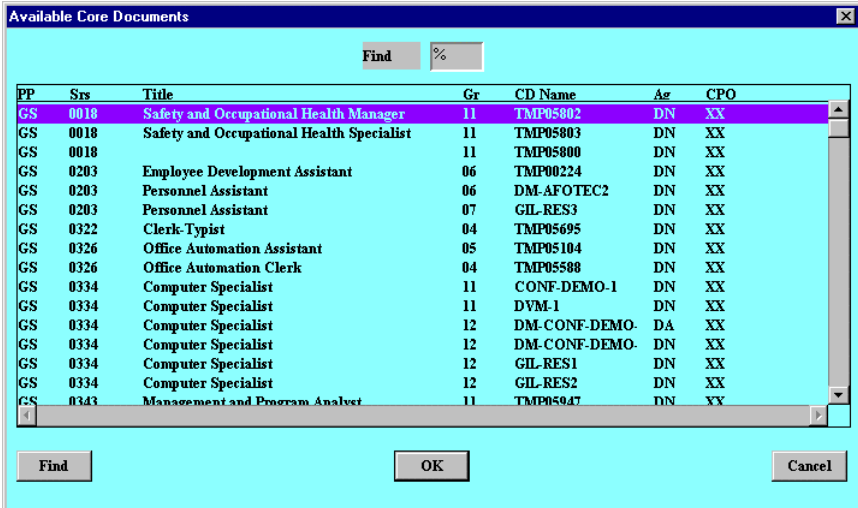
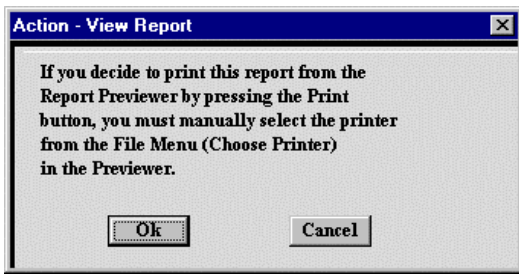
Step	Action
1	<p>The <b>Core Document Development System</b> window opens.</p> 
2	Click <b>F</b> ile and then click <b>V</b> iew on the Main Menu Bar.

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*Continued on next page*

## Viewing and Printing an Existing Core Document, Continued

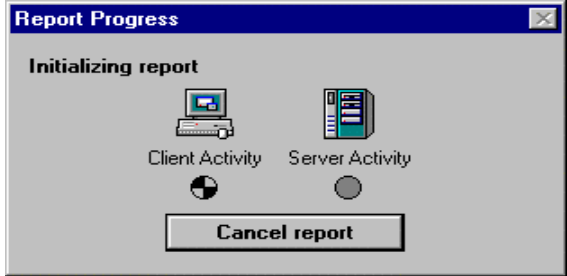
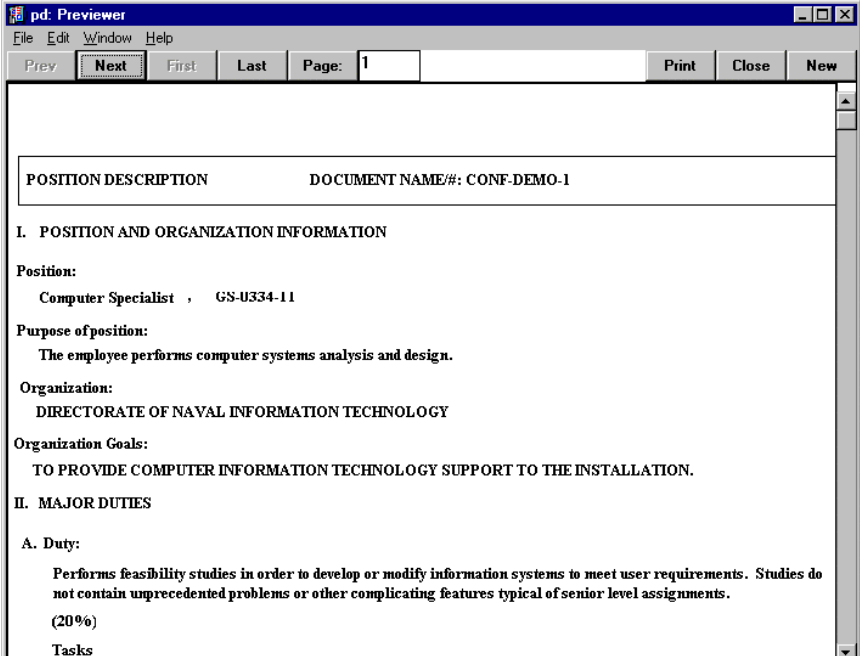

### Viewing a CD (continued)

Step	Action																																																																																																																							
3	<p>The <b>Available Core Documents</b> window opens. Select the CD you wish to preview.</p>  <table><thead><tr><th>PP</th><th>Srs</th><th>Title</th><th>Gr</th><th>CD Name</th><th>Ag</th><th>CPO</th></tr></thead><tbody><tr><td>GS</td><td>0018</td><td>Safety and Occupational Health Manager</td><td>11</td><td>TMP05002</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0018</td><td>Safety and Occupational Health Specialist</td><td>11</td><td>TMP05003</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0018</td><td></td><td>11</td><td>TMP05000</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Employee Development Assistant</td><td>06</td><td>TMP00224</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Personnel Assistant</td><td>06</td><td>DM-AFOTEC2</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0203</td><td>Personnel Assistant</td><td>07</td><td>GIL-RES3</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0322</td><td>Clerk-Typist</td><td>04</td><td>TMP05695</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0326</td><td>Office Automation Assistant</td><td>05</td><td>TMP05104</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0326</td><td>Office Automation Clerk</td><td>04</td><td>TMP05508</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>11</td><td>CONF-DEMO-1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>11</td><td>DVM-1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>DM-CONF-DEMO-</td><td>DA</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>DM-CONF-DEMO-</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>GIL-RES1</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0334</td><td>Computer Specialist</td><td>12</td><td>GIL-RES2</td><td>DN</td><td>XX</td></tr><tr><td>GS</td><td>0343</td><td>Management and Program Analyst</td><td>11</td><td>TMP05047</td><td>DN</td><td>XX</td></tr></tbody></table>	PP	Srs	Title	Gr	CD Name	Ag	CPO	GS	0018	Safety and Occupational Health Manager	11	TMP05002	DN	XX	GS	0018	Safety and Occupational Health Specialist	11	TMP05003	DN	XX	GS	0018		11	TMP05000	DN	XX	GS	0203	Employee Development Assistant	06	TMP00224	DN	XX	GS	0203	Personnel Assistant	06	DM-AFOTEC2	DN	XX	GS	0203	Personnel Assistant	07	GIL-RES3	DN	XX	GS	0322	Clerk-Typist	04	TMP05695	DN	XX	GS	0326	Office Automation Assistant	05	TMP05104	DN	XX	GS	0326	Office Automation Clerk	04	TMP05508	DN	XX	GS	0334	Computer Specialist	11	CONF-DEMO-1	DN	XX	GS	0334	Computer Specialist	11	DVM-1	DN	XX	GS	0334	Computer Specialist	12	DM-CONF-DEMO-	DA	XX	GS	0334	Computer Specialist	12	DM-CONF-DEMO-	DN	XX	GS	0334	Computer Specialist	12	GIL-RES1	DN	XX	GS	0334	Computer Specialist	12	GIL-RES2	DN	XX	GS	0343	Management and Program Analyst	11	TMP05047	DN	XX
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4	Click <OK>.																																																																																																																							
5	<p>The <b>Action – View Report</b> Dialog Box opens with the statement, “If you decide to print this report from the Report Previewer by pressing the Print button, you must manually select the printer from the File Menu (Choose Printer) in the Previewer.”</p> <p>Click &lt;Ok&gt;.</p> 																																																																																																																							

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## Viewing and Printing an Existing Core Document, Continued

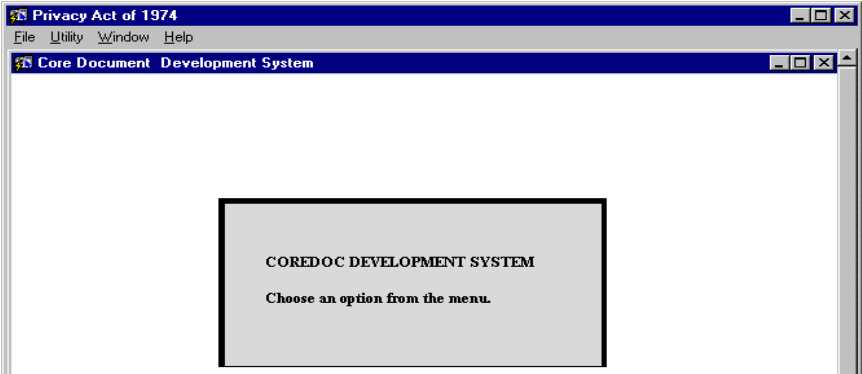
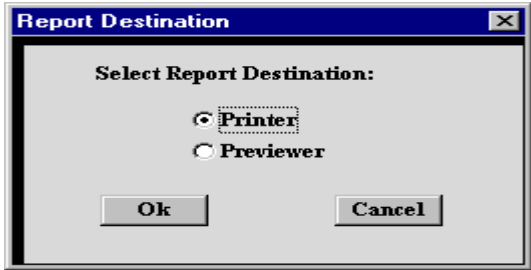
### Viewing a CD (continued)

Step	Action
6	<p>The <b>Report Progress</b> Dialog Box opens informing you that the activity is processing.</p>  <p>The dialog box titled "Report Progress" shows "Initializing report". It contains two progress indicators: "Client Activity" (a pie chart) and "Server Activity" (a circle). A "Cancel report" button is at the bottom.</p>
7	<p>The <b>pd: Previewer</b> window opens with a menu bar, eight Taskflow Button, a page indicator, and a scroll bar.</p>  <p>The previewer window shows a document titled "CONF-DEMO-1". The content includes:</p> <p><b>POSITION DESCRIPTION</b>      <b>DOCUMENT NAME#:</b> CONF-DEMO-1</p> <p><b>I. POSITION AND ORGANIZATION INFORMATION</b></p> <p><b>Position:</b> Computer Specialist , GS-U334-11</p> <p><b>Purpose of position:</b> The employee performs computer systems analysis and design.</p> <p><b>Organization:</b> DIRECTORATE OF NAVAL INFORMATION TECHNOLOGY</p> <p><b>Organization Goals:</b> TO PROVIDE COMPUTER INFORMATION TECHNOLOGY SUPPORT TO THE INSTALLATION.</p> <p><b>II. MAJOR DUTIES</b></p> <p><b>A. Duty:</b> Performs feasibility studies in order to develop or modify information systems to meet user requirements. Studies do not contain unprecedented problems or other complicating features typical of senior level assignments. (20%)</p> <p><b>Tasks</b></p> <p> <b>Note:</b> You can preview the first page of the CD by using the scroll bar on the side. If you want to preview the rest of the CD, click &lt;Next&gt; until you get to the last page.</p>

*Continued on next page*

## Viewing and Printing an Existing Core Document, Continued

### Printing a CD

Step	Action
1	Click <Close> to return to the <b>Core Document Development System</b> window.  
2	Follow Steps 3 and 4 in Viewing a CD.
3	The Report Destination window opens. Select Printer to print the CD. Click <OK>.  
4	Follow Steps 5 and 6 in Viewing a CD.
5	The CD prints to your default printer.
6	The <b>COREDOC Development System</b> window opens.
7	Click <b>F</b> ile, and click <b>E</b> xit to return to the <b>Navigator</b> window.

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# Modifying a Core Document

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**Purpose** After you generate a core document (CD), you have the option to edit and modify the document. This section explains how to modify an existing CD.

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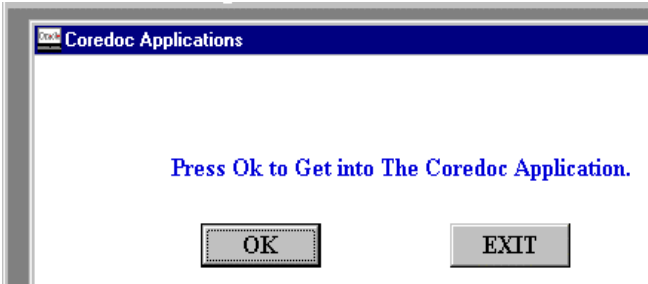
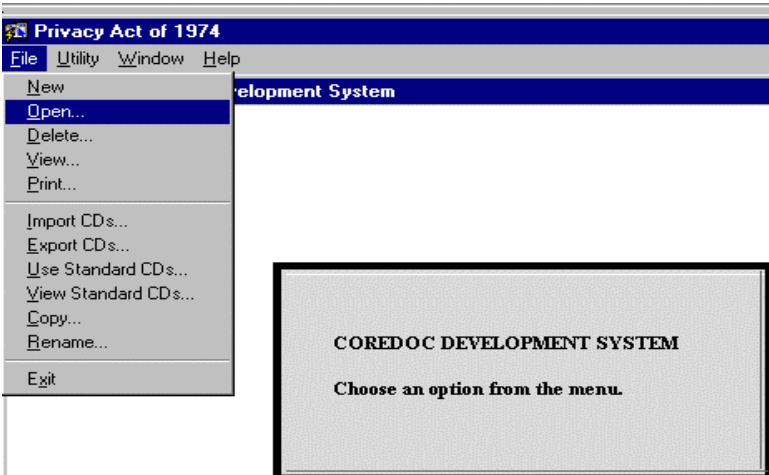
- Section Contents**
- Retrieving an Existing CD
  - Opening a CD
  - Edit Menu
  - Editing and Modifying:
    - Goals and Purpose
    - Major Duties
    - Percentages of Assigned Duties
    - Knowledge Factors
    - Other Factors
    - KSAs
    - Staffing KSAs
    - Other Work Requirements
    - Performance Management Plan
    - Title/Pay Plan/Series
    - Cover Sheet
    - Classification Remarks
  - Adding More Occupations
  - Adding the Classification Summary
- 

- Before You Begin**
- The options on the Toolbar and drop-down menus are defined in the Overview section of this module.
  - The **Help** option is available on the Main Menu Bar and includes the two drop-down choices:
    - **Help System** provides general information about the purpose and general functionality in COREDOC.
    - **Show Key** provides information on using convention keystrokes.
  - You must be in the Role of Classifier or Super User to modify the Cover Sheet.
- 

*Continued on next page*

## Modifying a Core Document, Continued


### Retrieving an Existing CD

Step	Action
1	Navigation Path <b>□ Coredoc ▾ &lt;Open&gt;</b> .
2	<p>The <b>Coredoc Applications</b> window opens. Click <b>&lt;OK&gt;</b>.</p> 
3	<p>The <b>Core Document Development System</b> window opens. Click <b>F</b>ile. From the drop-down menu, click <b>O</b>pen.</p> 

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## Modifying a Core Document, Continued

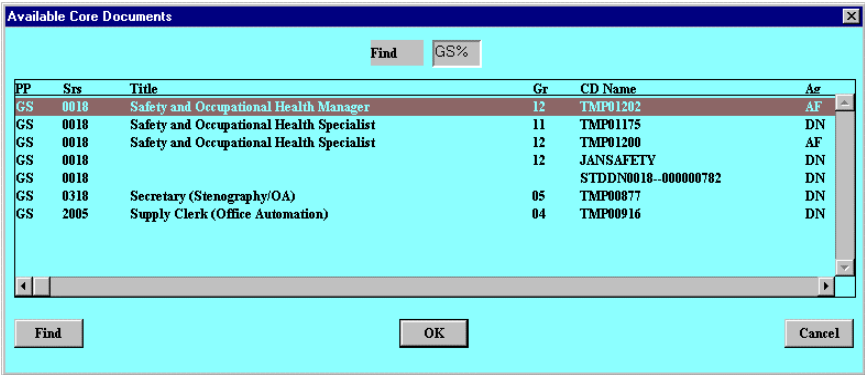
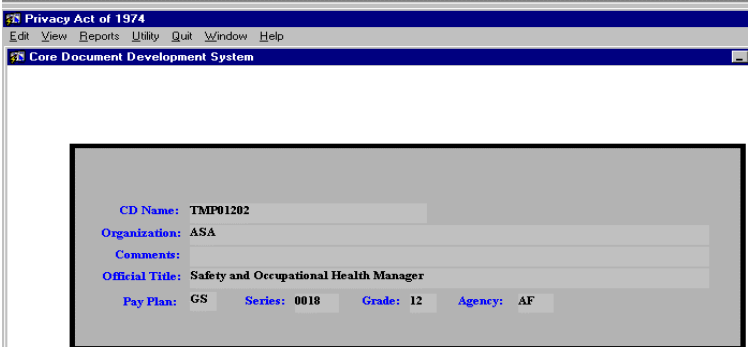

### Opening a CD

Step	Action
1	<p>The <b>Core Document Selection</b> window opens. There are two Taskflow buttons to use in editing a CD.</p> <div data-bbox="646 552 1307 856" data-label="Image"> </div> <p>&lt;CDs w/CPCNs&gt; - Opens the <b>Available Core Document</b> window which contains CDs with CPCNs already assigned.</p> <p>&lt;My CDs&gt; - Opens the <b>Available Core Documents</b> window which contains a listing of CDs you have generated. (They are not activated until you link them with an RPA.)</p> <p>&lt;Cancel&gt; - Returns to the <b>Core Document Main Menu</b>.</p> <p> <b>Note:</b> If you previously created CDs but did not link one to an RPA, this window will be by-passed and will take you to the <b>Available Core Documents</b> Window in step 2.</p> <p>Click &lt;My CDs&gt;. (This is used for illustration purposes only.)</p>

*Continued on next page*

## Modifying a Core Document, Continued

### Opening a CD (continued)

Step	Action
2	<p>The <b>Available Core Documents</b> window opens a listing of Core Documents, which includes <i>PP</i>, <i>Series</i>, <i>Title</i>, <i>Grade</i>, <i>CD Name</i>, <i>Agency</i>, and <i>CPO</i>. Click the CD you need to modify and click &lt;OK&gt;.</p> 
3	<p>The <b>Core Document Development System</b> window opens. Click <u>E</u>dit.</p>  <p> <b>Note:</b> You can modify most data fields in a CD, except those determined by your Component's business rules.</p>

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## Modifying a Core Document, Continued

### Edit Menu

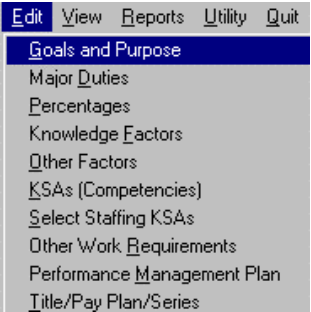

The Edit Menu contains 15 options to use in modifying a CD:

Menu Item	Function/Description
<b><u>G</u>oals and Purpose</b>	Use to change the Organizational Goals and Purpose.
<b><u>M</u>ajor Duties</b>	Use to modify duties and tasks.
<b><u>P</u>ercentages</b>	Use to change the percentages of time assigned.
<b><u>K</u>nowledge Factors</b>	Use to edit the classification Knowledge factors.
<b><u>O</u>ther Factors</b>	Use to edit other classification factors.
<b><u>K</u>SAs (Competencies)</b>	Use to add, delete, or modify the Basic KSAs.
<b><u>S</u>elect Staffing KSAs</b>	Use to select or deselect previously selected staffing (requirement) KSAs.
<b><u>O</u>ther Work <u>R</u>equirements</b>	Use to modify, add, or delete supplementary duties and responsibilities.
<b><u>P</u>erformance <u>M</u>anagement Plan</b>	Use to add, delete, or modify performance elements and standards.
<b><u>T</u>itle/Pay Plan/Series</b>	Use to change title series, and/or pay plan.
<b><u>C</u>over Sheet</b>	Used by supervisors and managers to complete and sign a cover sheet. The <b><i>Cover Sheet</i></b> option activates under the Edit and Reports toolbar menus when a CD has been attached to an RPA.
<b><u>C</u>lassification <u>R</u>emarks</b>	Use to add remarks to the summary information.
<b><u>M</u>ore <u>O</u>ccupations</b>	Use to add duties from a different Occupational series.
<b><u>C</u>lassification <u>S</u>ummary</b>	Use to view the classification summary.
<b><u>E</u>xit</b>	Use to exit and return to the <b>Main Coredoc</b> window.

*Continued on next page*

## Modifying a Core Document, Continued

### Modifying Goals and Purpose


Step	Action
1	<p>Click <b>Goals and Purpose</b>.</p> 
	<p>The <b>Core Document Development System – Goals and Purpose</b> window opens.</p>  <p>There are three Taskflow buttons:</p> <ul style="list-style-type: none"> <li>• <b>&lt;Edit&gt;</b> - Allows you to modify the goals and purposes.</li> </ul> <p><b>Note:</b> When you click <b>&lt;Edit&gt;</b>, the <b>&lt;Exit&gt;</b> Button will change to <b>&lt;SAVE&gt;</b>.</p> <ul style="list-style-type: none"> <li>• <b>&lt;Standard Goals&gt;</b> - Auto populates the organization's name and goals in the designated fields.</li> <li>• <b>&lt;Exit&gt;</b> - Returns you to the <b>Core Document Development</b> window.</li> </ul>

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## Modifying a Core Document, Continued

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### Modifying Goals and Purpose (continued)

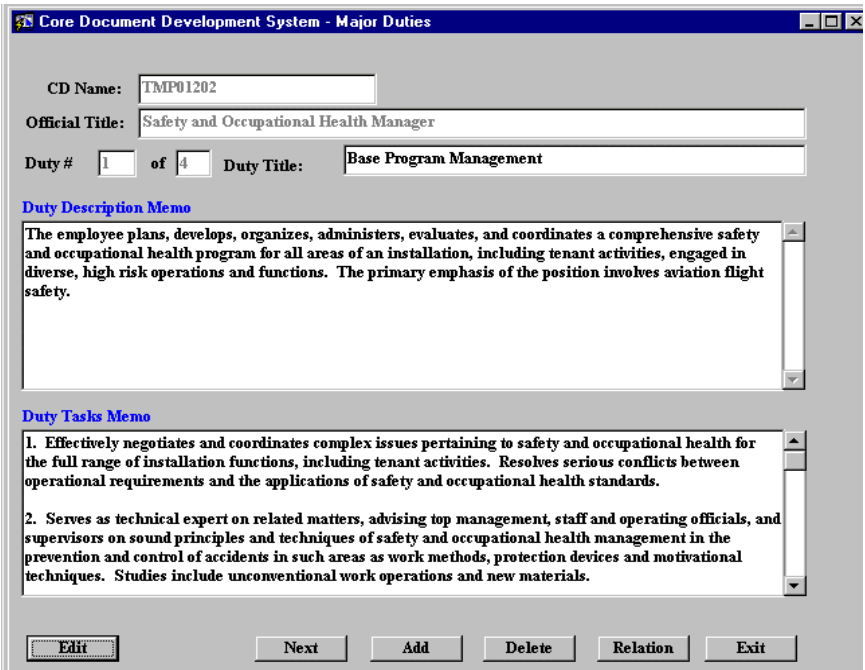
Step	Action
2	Place your cursor in the data field that needs editing. Click <b>&lt;Edit&gt;</b> and make the necessary changes.
3 	Click <b>&lt;Save&gt;</b> to save your changes. <b>Note:</b> The button returns to <b>&lt;Exit&gt;</b> , once Save is clicked.
4	Click <b>&lt;Exit&gt;</b> to return to the <b>Core Document Development</b> window.

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## Modifying a Core Document, Continued

### Editing Major Duties

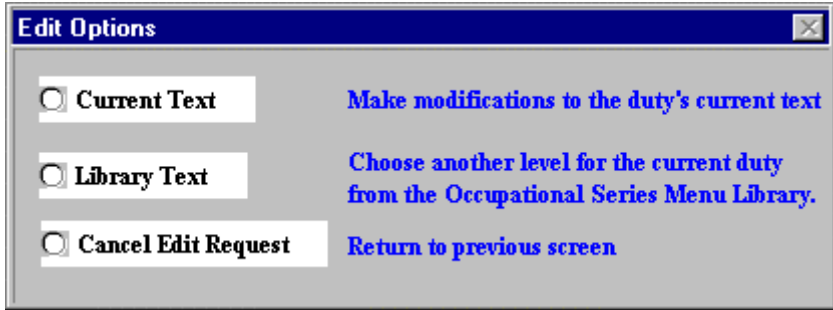

Step	Action
1	Click <b>Edit</b> , then click <b>Major Duties</b> on the Main Menu Bar.
2	<p>The <b>Core Document Development System - Major Duties</b> window opens with the information automatically populated.</p> 

*Continued on next page*



## Modifying a Core Document, Continued

### Editing Major Duties (continued)

Step	Action
3	<p>Click &lt;<b>Edit</b>&gt; to edit the displayed duty statement, or</p> <p>Click &lt;<b>Next</b>&gt; to view the next duty statement, or</p> <p>Click &lt;<b>Add</b>&gt; to add a new duty statement, or</p> <p>Click &lt;<b>Delete</b>&gt; to delete the current duty statements, or</p> <p>Click &lt;<b>Relation</b>&gt; to understand the connections between individual duty statements and the classification knowledge and training competencies, or</p> <p>Click &lt;<b>Exit</b>&gt; to exit the window.</p>
4	<p>Click &lt;<b>Edit</b>&gt; to display the <b>Edit Options Dialog Box</b>, which allows you to select one of the three options, described in clear text.</p>  <p>Click  <b>Current Text</b>.</p>
5	<p>The <b>Duty Statement for Level 1</b> window opens.</p> <p>Place your cursor in one of the text boxes to change any of the text or to delete the current text and type in the new text.</p> <p>Click &lt;<b>Edit</b>&gt; to modify the text. The duty statement opens.</p> <p>Delete and make changes as needed.</p>

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## Modifying a Core Document, Continued

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### Editing Major Duties (continued)

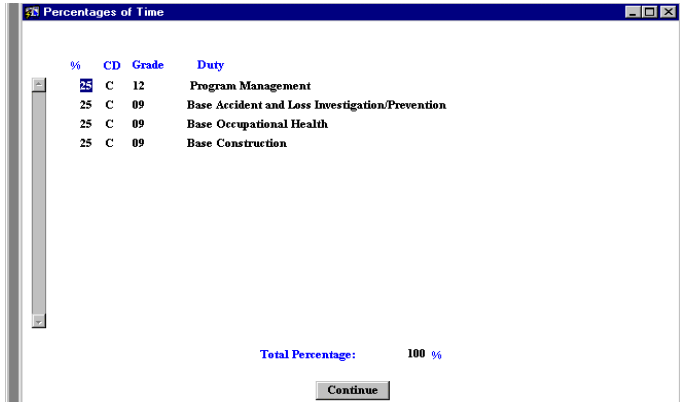
Step	Action
6	Click <Save>.
7	Click <Next> to view the next duty statement on the <b>Core Document Development System – Major Duties</b> window. Use your Edit and Save buttons to continue editing your document, or Click <Add> to add a new duty statement to the <b>Core Document Development System – Major Duties</b> window, or Click <Delete> to delete a duty from the <b>Core Document Development System – Major Duties</b> window.
8	Click <Exit> when you complete editing the major duties.

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## Modifying a Core Document, Continued

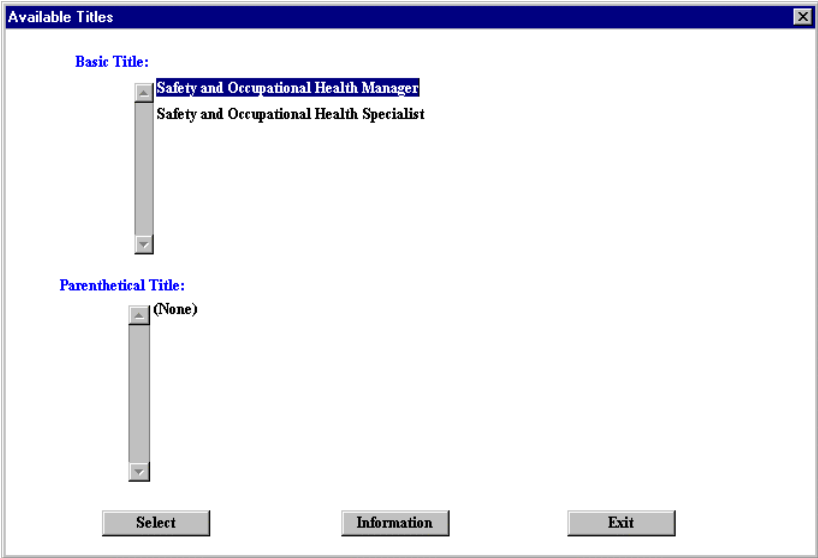
### Modifying Percentages of Assigned Duties

Step	Action
1	Click <b>E</b> dit and click <b>P</b> ercentages on the Main Menu Bar.
2	<p>The <b>Percentages of Time</b> window opens with a list of duties selected for a CD and the percentages of time spent performing each duty or work objective with the total percentage shown at the bottom. Normally, it totals 100 percent but may fall within a range of 90-100. If the total is more than 90 and less than 100, the additional duty statement “Performs Other Duties as Assigned” opens.</p> <p>Click the desired number to be changed and enter the new number.</p> <p>If you select the CRITICAL/NONCRITICAL setting, a column opens between percentage and duty. All duties are indicated as critical with a “C” in the column. To change a duty to non-critical, type an “N” over the desired “C” in the column.</p> 

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## Modifying a Core Document, Continued

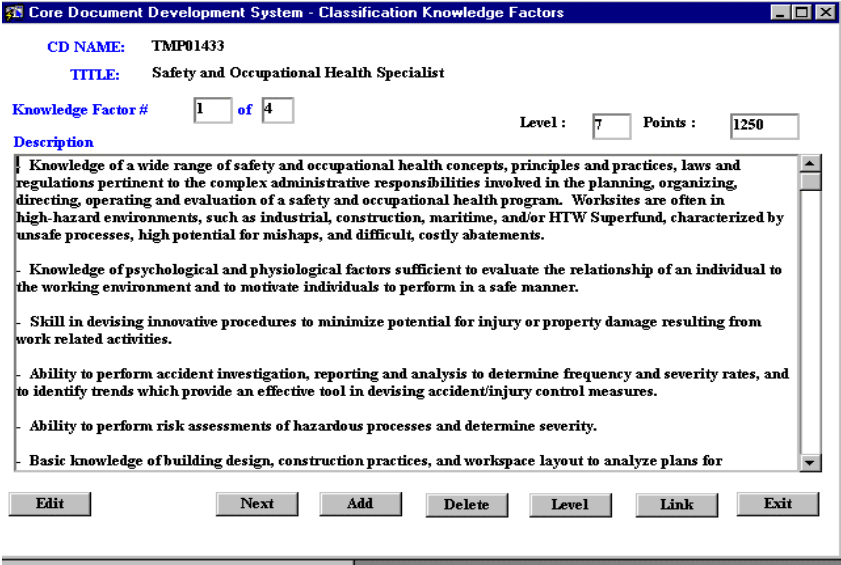
### Modifying Percentages of Assigned Duties (continued)

Step	Action
3	Click <Continue>.
4	The <b>Please Wait</b> Dialog Box opens stating “Processing information into the database...”
5	<p>The <b>Available Titles</b> window opens. Make modifications as needed using these buttons.</p> <p>Click &lt;Select&gt; - to make the title selection.</p> <p>Click &lt;Information&gt; - to see information about titling practices appropriate for the position.</p> <p>Click &lt;Exit&gt; to return to the Main Menu.</p> 

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## Modifying a Core Document, Continued

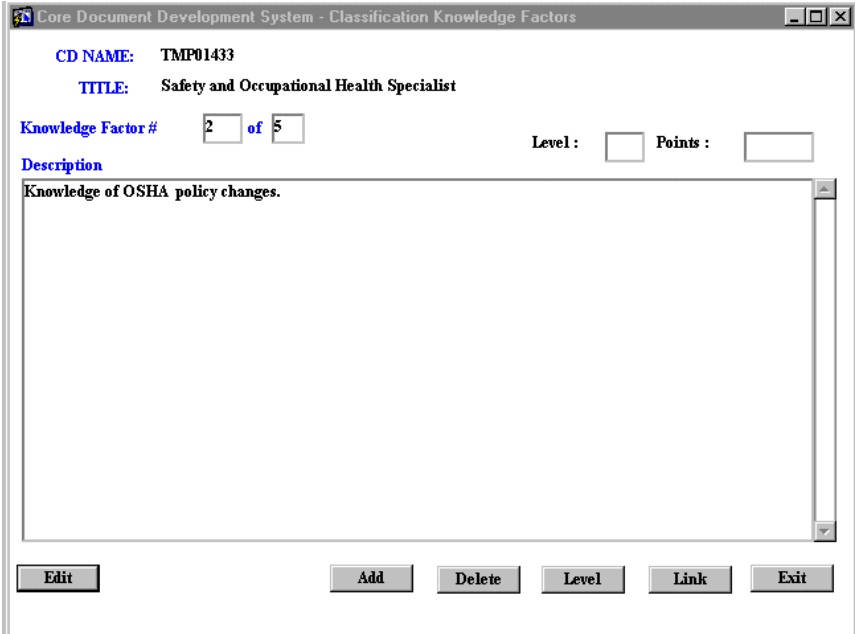
### Editing Knowledge Factors

Step	Action
1	Click <b>Edit</b> and click <b>Knowledge Factors</b> on the Main Menu Bar.
2	<p>The <b>Core Document Classification Knowledge Factors</b> window opens.</p> <p>Click <b>&lt;Add&gt;</b> to include a new knowledge factor, which creates a new record and attaches it, to the end of the knowledge factors section.</p> 

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## Modifying a Core Document, Continued

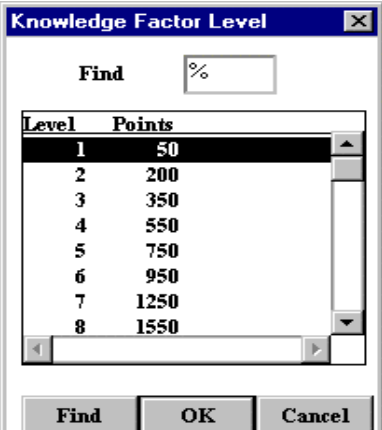
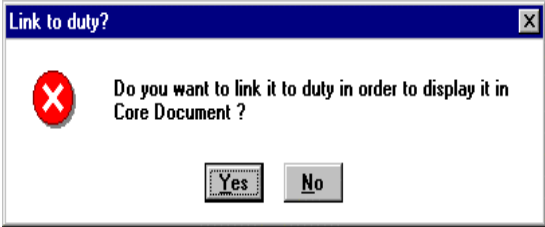
### Editing Knowledge Factors (continued)

Step	Action
3	<p>The <b>Core Development System – Classification Knowledge Factors</b> window opens. Type in the additional knowledge factor in the <i>Description</i> field. Click &lt;Add&gt;.</p> <p><b>Caution:</b> If you delete a classification knowledge, it could impact on the classification of the position.</p> 

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## Modifying a Core Document, Continued

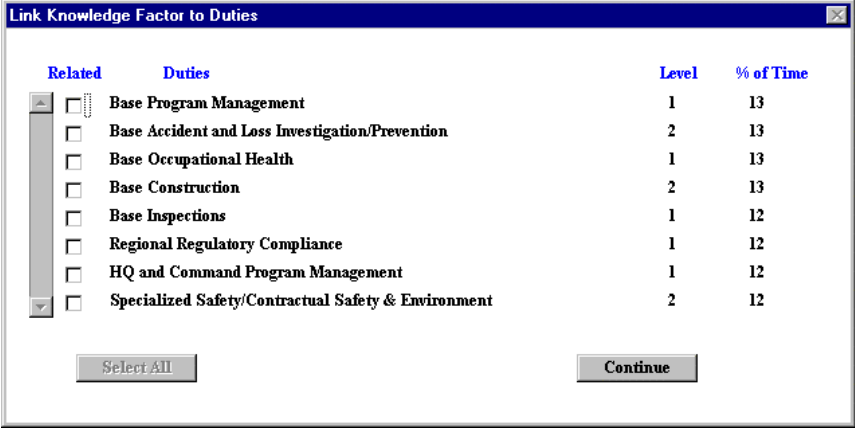
### Editing Knowledge Factors (continued)

Step	Action
4	<p>The <b>Knowledge Factor Level</b> Flexfield opens. Select Level and Points. Click &lt;OK&gt;.</p> 
5	<p>The <b>Link to duty?</b> Dialog Box opens and asks, “Do you want to link it to a duty in order to display it in the Core Document?”</p> <p>Click &lt;<u>Y</u>es&gt;.</p> 

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## Modifying a Core Document, Continued

### Editing Knowledge Factors (continued)

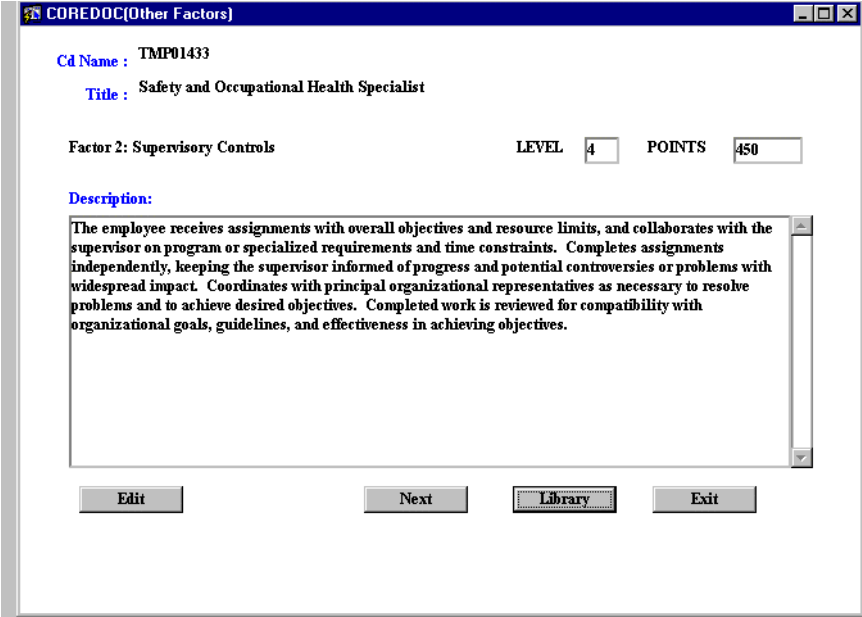
Step	Action
6	<p>The <b>Link Knowledge Factor to Duties</b> window opens. Select one of the two Taskflow buttons.</p> <p>&lt;<b>Select All</b>&gt; - Links the new knowledge factor with the duty statements.</p> <p>&lt;<b>Continue</b>&gt; - Returns to the previous window.</p> <p>To select a related duty, click on the check boxes next to a duty name.</p> <p>You can click &lt;<b>Select All</b>&gt; or select individually by checking the related check boxes.</p>  <p>Click &lt;<b>Continue</b>&gt;.</p>
7	<p>The <b>Core Document Development System – Classification Knowledge Factors</b> window opens.</p> <p>Click &lt;<b>Exit</b>&gt; to return to the Main Menu.</p>

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## Modifying a Core Document, Continued

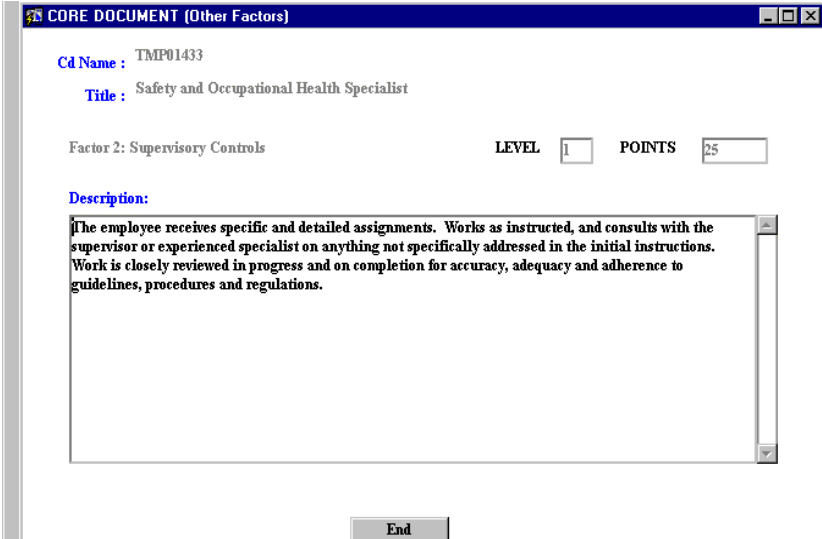
### Editing Other Factors

Step	Action
1	Click <b>Edit</b> and click <b>Other Factors</b> on the Main Menu Bar.
2	<p>The <b>COREDOC (Other Factors)</b> window opens.</p> <p>&lt;<b>Edit</b>&gt; –Edits a classification factor.</p> <p>&lt;<b>Next</b>&gt; - Views the next knowledge factor.</p> <p>&lt;<b>Library</b>&gt; - Lists other factor level options from the occupational database library.</p> <p>&lt;<b>Exit</b>&gt; – Returns to the Main Menu.</p>  <p>Click &lt;<b>Edit</b>&gt;.</p>

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## Modifying a Core Document, Continued

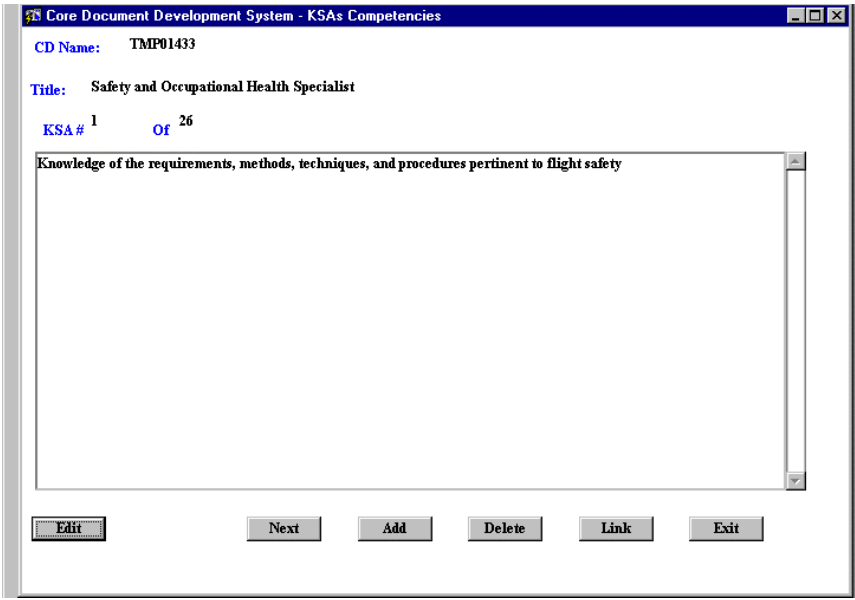
### Editing Editing Other Factors (continued)

Step	Action
3	<p>The <b>CORE DOCUMENT (Other Factors)</b> window opens. Make the necessary changes in the knowledge factors in the Description field.</p>  <p>Click &lt;End&gt;.</p>
4	<p>You are returned to the <b>CORE DOCUMENT [Other Factors]</b> window. Click &lt;Exit&gt; to return to the Main Menu.</p>

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## Modifying a Core Document, Continued

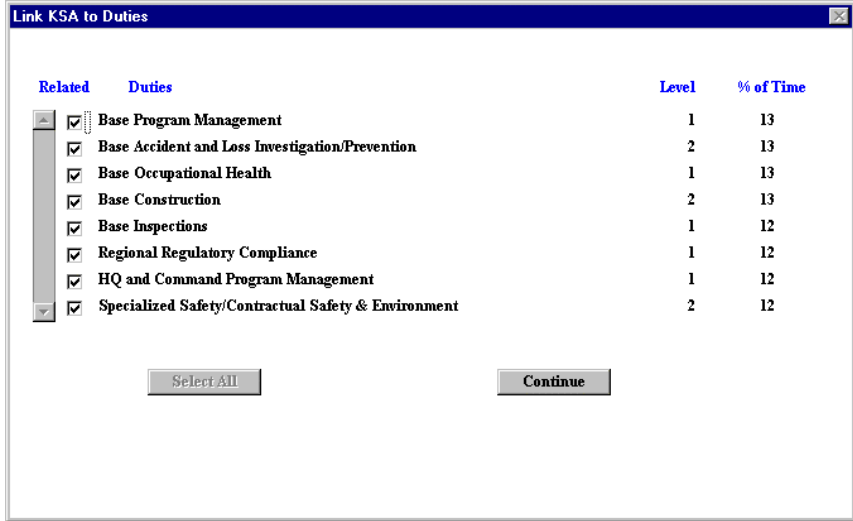
### Editing KSAs (Competencies)

Step	Action
1	Click <b>Edit</b> , then click <b>KSAs</b> on the Main Menu.
2	<p>The <b>Core Document - KSAs Competencies</b> window opens. You are presented with six buttons from which to make a selection.</p> <p>&lt;Edit&gt; –Edits the displayed competency (KSA).            &lt;Next&gt; – View the next competency (KSA).            &lt;Add&gt; – Add a new competency (KSA).            &lt;Delete&gt; –Delete the current competency (KSA).            &lt;Link&gt; –Links one or more competencies to a Duty Statement.            &lt;Exit&gt; – Returns to the Main Menu.</p> <p>Click &lt;Link&gt;.</p> 

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## Modifying a Core Document, Continued

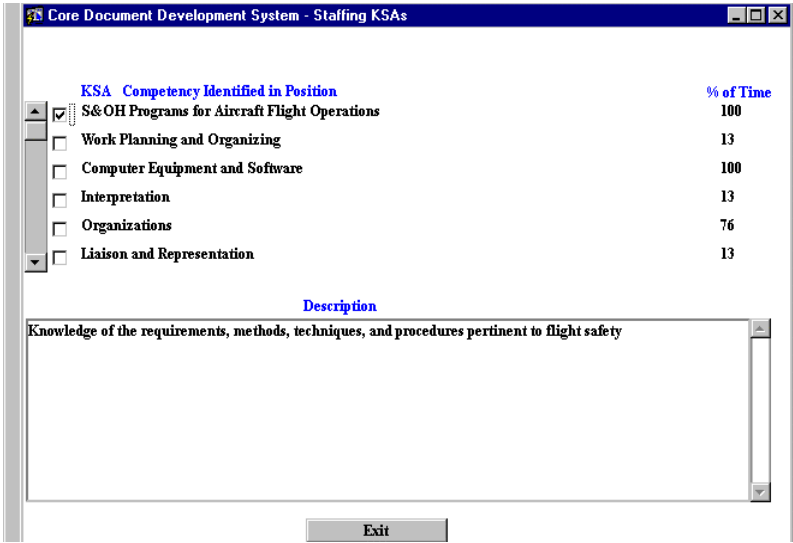
### Editing KSAs (Competencies) (continued)

Step	Action																																				
3	<p>The <b>Link KSA to Duties</b> window opens with two buttons. Click the check boxes next to duties, as needed. Click <b>&lt;Continue&gt;</b>.</p>  <table><thead><tr><th>Related</th><th>Duties</th><th>Level</th><th>% of Time</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Base Program Management</td><td>1</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Accident and Loss Investigation/Prevention</td><td>2</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Occupational Health</td><td>1</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Construction</td><td>2</td><td>13</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Base Inspections</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Regional Regulatory Compliance</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>HQ and Command Program Management</td><td>1</td><td>12</td></tr><tr><td><input checked="" type="checkbox"/></td><td>Specialized Safety/Contractual Safety &amp; Environment</td><td>2</td><td>12</td></tr></tbody></table>	Related	Duties	Level	% of Time	<input checked="" type="checkbox"/>	Base Program Management	1	13	<input checked="" type="checkbox"/>	Base Accident and Loss Investigation/Prevention	2	13	<input checked="" type="checkbox"/>	Base Occupational Health	1	13	<input checked="" type="checkbox"/>	Base Construction	2	13	<input checked="" type="checkbox"/>	Base Inspections	1	12	<input checked="" type="checkbox"/>	Regional Regulatory Compliance	1	12	<input checked="" type="checkbox"/>	HQ and Command Program Management	1	12	<input checked="" type="checkbox"/>	Specialized Safety/Contractual Safety & Environment	2	12
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<input checked="" type="checkbox"/>	HQ and Command Program Management	1	12																																		
<input checked="" type="checkbox"/>	Specialized Safety/Contractual Safety & Environment	2	12																																		
4	<p>You are returned to the previous window. Click <b>&lt;Exit&gt;</b> to return to the Main Menu.</p>																																				

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## Modifying a Core Document, Continued

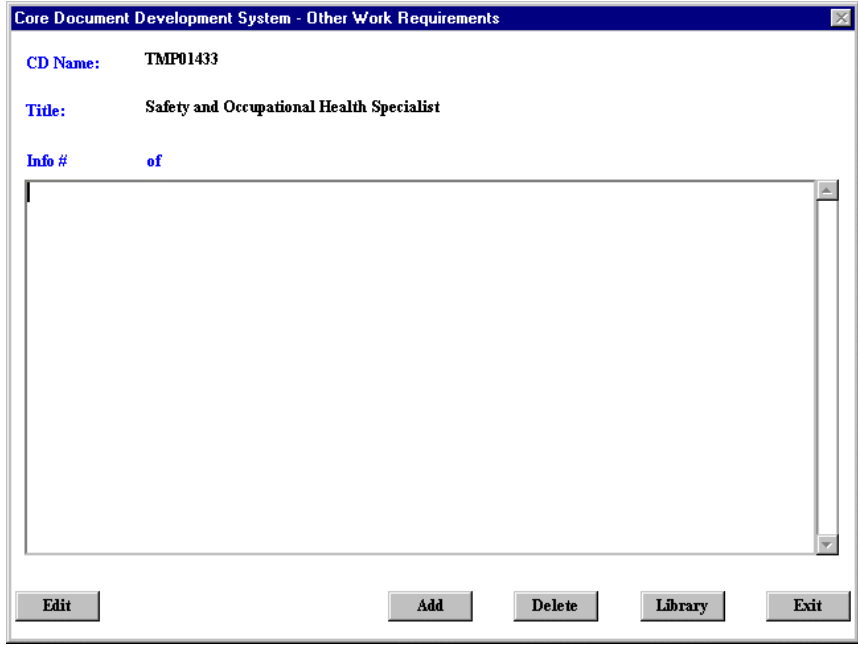
### Editing Staffing KSAs

Step	Action
1	Click <b>Edit</b> , then click <b>Select Staffing KSAs</b> on the Main Menu.
2	<p>The <b>Core Document Development System – Staffing KSAs</b> window opens.</p> <p>Click the appropriate check boxes next to each KSA Competency.</p> <p>Click <b>&lt;Exit&gt;</b> to return to the Main Menu.</p> 

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## Modifying a Core Document, Continued

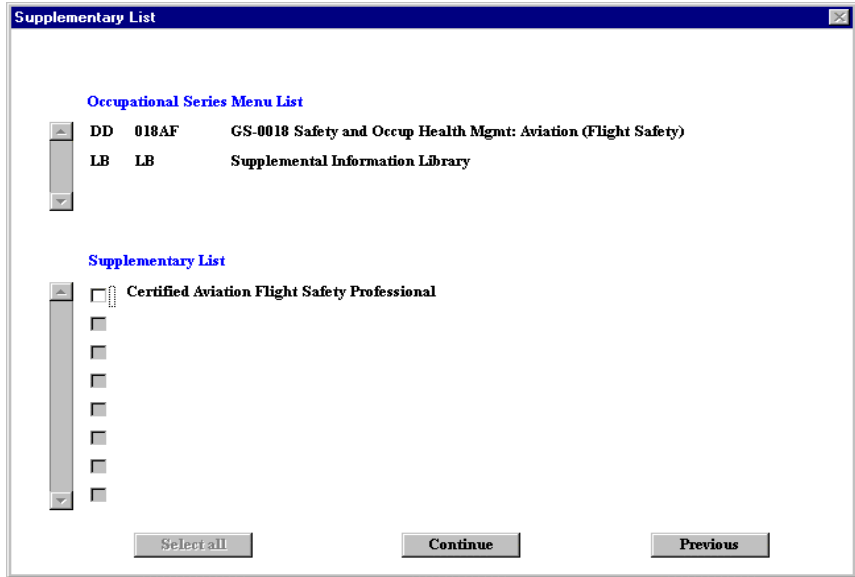
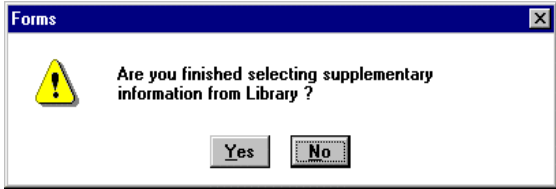
### Modifying Other Work Requirements

Step	Action
1	Click <b>E</b> dit, then click <b>O</b> ther Work <b>R</b> equirements on the Main Menu.
2	<p>The <b>Core Document Development System – Other Work Requirements</b> window opens.</p> <p>Click &lt;<b>L</b>ibrary&gt; to view a list of supplemental items for an occupational series.</p> 

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## Modifying a Core Document, Continued

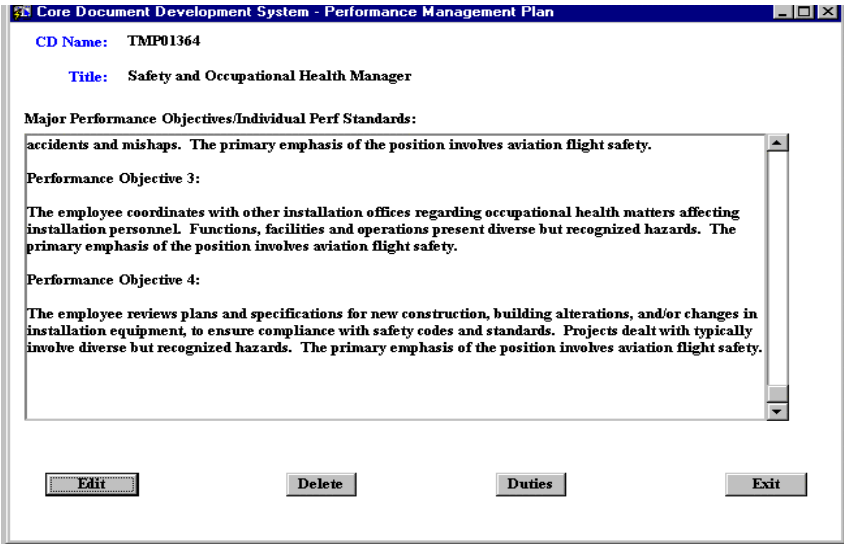
### Modifying Other Work Requirements (continued)

Step	Action
3	<p>The <b>Supplementary List</b> window opens. Click the check boxes desired from the <i>Supplementary List</i> and click &lt;Continue&gt;.</p> 
4	<p>The <b>Forms</b> Dialog Box opens, asking, “Are you finished selecting supplementary information from Library?” Click &lt;Yes&gt;.</p> 
5	<p>The <b>Core Document Development System – Other Work Requirements</b> window opens again with your changes. Review and click &lt;Exit&gt; to return to the Main Menu.</p>

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## Modifying a Core Document, Continued

### Modifying the Performance Management Plan

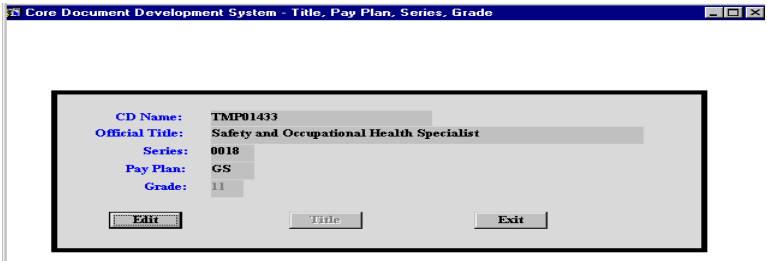
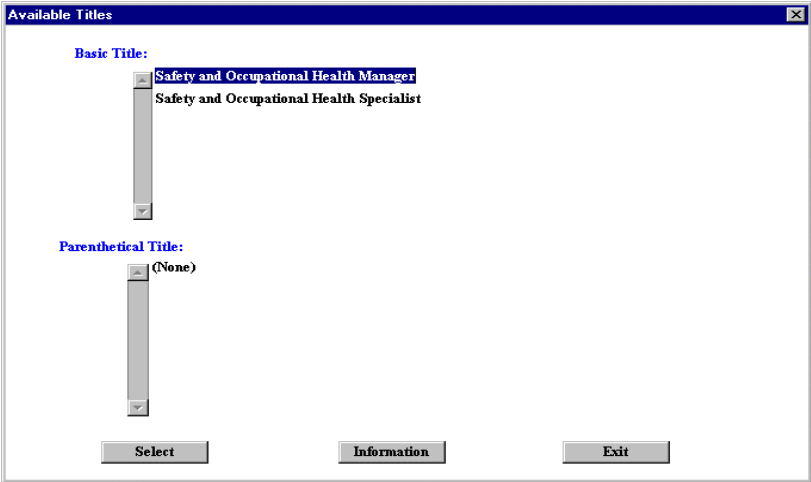
Step	Action
1	Click <b>E</b> dit, then click <b>P</b> erformance <b>M</b> anagement <b>P</b> lan on the Main Menu.
2	<p>The <b>Core Document Development System – Performance Management Plan</b> opens with four Taskflow buttons. Click &lt;<b>D</b>uties&gt; to select the Standard Performance Requirements.</p> 
3	<p><b>Note:</b> The Main Menu or a component-specific <b>Performance Management Plan</b> window will display. The window opens if a CPCN assigned to the core document.</p> <p>Click &lt;<b>E</b>dit&gt; to modify a performance element. Use the scroll bar to navigate through the performance elements.</p> <p>Click &lt;<b>D</b>elete&gt; to remove all of the performance elements from the CD.</p>
4	Click < <b>E</b> xit> to return to the Main Menu.

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## Modifying a Core Document, Continued

### Editing the Title/Pay Plan/Series

Step	Action
1	Click <b>Edit</b> , then click <b>Title/Pay Plan/Series</b> on the Main Menu.
2	<p>The <b>Core Document Development System – Title, Pay Plan, Series, Grade</b> window opens.</p> <p>Click <b>&lt;Edit&gt;</b>.</p> 
3	<p>The same window opens with <i>Official Title</i> highlighted and the three option buttons <b>&lt;Edit&gt;</b>, <b>&lt;Title&gt;</b>, and <b>&lt;Exit&gt;</b>.</p> <p>Click <b>Title</b>.</p>
4	<p>The <b>Available Titles</b> window opens with three Taskflow buttons.</p> <p><b>&lt;Select&gt;</b> - To make the title selection.</p> <p><b>&lt;Information&gt;</b> -To view Occupational Information.</p> <p><b>&lt;Exit&gt;</b> -To return to the previous screen.</p> <p>Click your title selection and click <b>&lt;Select&gt;</b>.</p> 

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## Modifying a Core Document, Continued

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Step	Action
5	The <b>Core Document Development System – Title, Pay Plan, Series, Grade</b> window opens with the newly selected title. Click <Exit> to return to the Main Menu.

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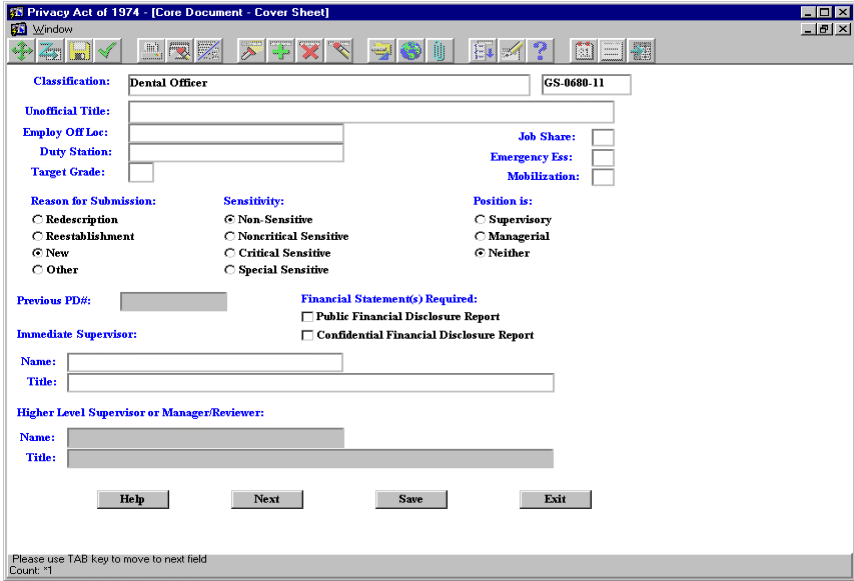
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## Modifying a Core Document, Continued

### Editing the Cover Sheet



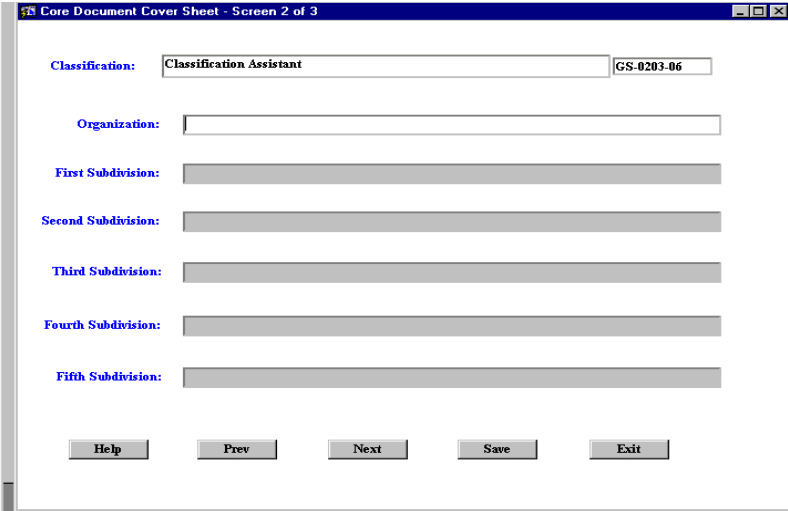
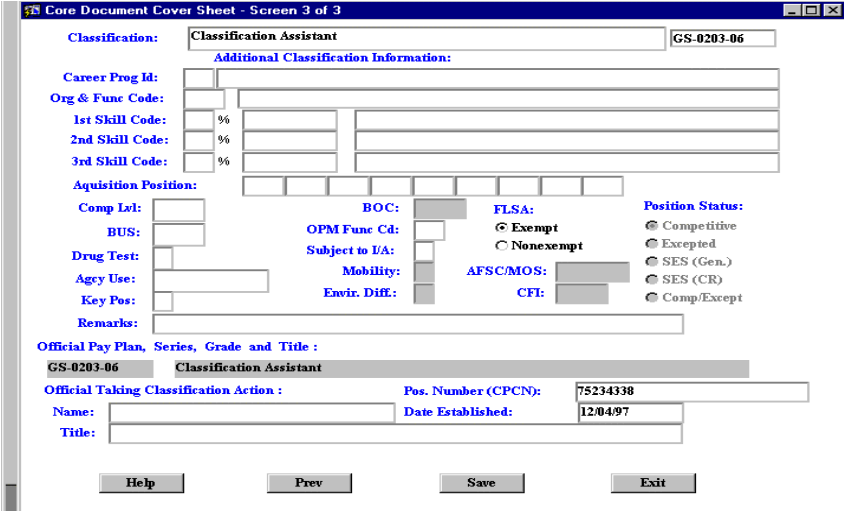
**Note:** Only users with the Classifier or Super User role can access the Cover Sheet. The Cover Sheet will vary from Component to Component.

Step	Action
1	Click <b>Edit</b> then click <b>Cover Sheet</b> on the Main Menu.
2	<p>The <b>Core Document – Cover Sheet</b> window opens with four Taskflow buttons. Change information in the needed data fields. Click <b>Save</b> and then click <b>&lt;Next&gt;</b>.</p> 

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## Modifying a Core Document, Continued

### Editing the Cover Sheet (continued)

Step	Action
3	<p><b>Core Document Cover Sheet – Screen 2 of 3</b> opens with five Taskflow buttons. Input information in the needed data fields. Click <b>Save</b> and then click <b>&lt;Next&gt;</b>.</p> 
4	<p><b>Core Document Cover Sheet – Screen 3 of 3</b> opens with four Taskflow buttons. Change information in the needed data fields. Click <b>&lt;Save&gt;</b>.</p> 

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## Modifying a Core Document, Continued

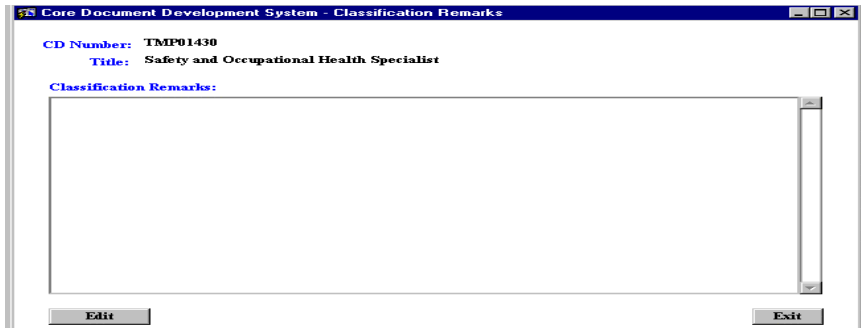
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### Editing the Cover Sheet (continued)

Step	Action
5	Click <Exit> to return to the Main Menu.

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### Editing Classification Remarks

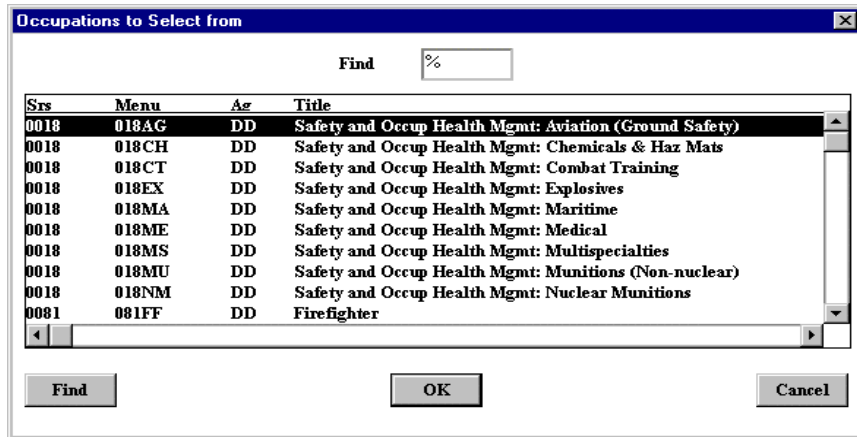
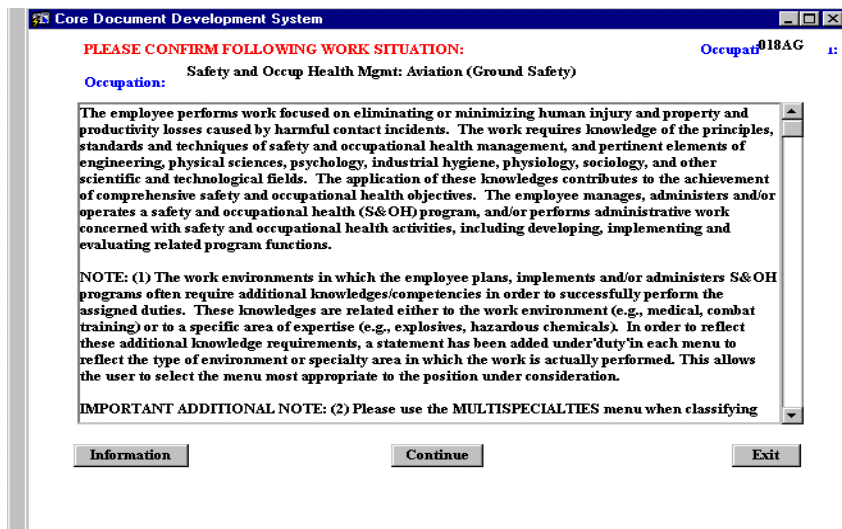
Step	Action
1	Click <b>E</b> dit, then click <b>C</b> lassification Remarks on the Main Menu
2	<p>The <b>Core Document Development System – Classification Remarks</b> window opens with two Taskflow buttons.</p> <p>Click &lt;Edit&gt; and place your cursor in the <i>Classification Remarks</i> data field and type your input.</p> <p>Click &lt;End Edit&gt; once you have finished.</p> 
3	Click <Exit> to return to the Main Menu.

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## Modifying a Core Document, Continued

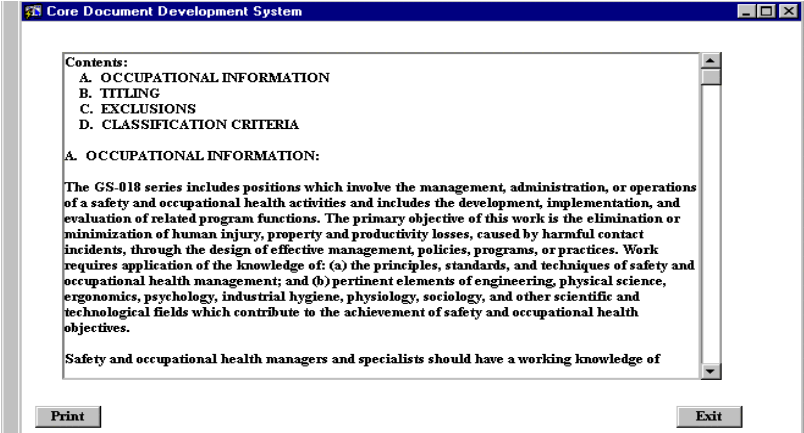
### Adding More Occupations

Step	Action
1	Click <b>Edit</b> , then click <b>More Occupations</b> on the Main Menu.
2	<p>The <b>Occupations to Select from</b> window opens. Click the occupation(s) you plan to add. Click <b>&lt;OK&gt;</b>.</p> <div></div>
3	<p>The <b>Core Document Development System</b> window opens with three Taskflow Buttons.</p> <p>The message asks, “PLEASE CONFIRM FOLLOWING WORK SITUATION.” Review the information.</p> <p>Click <b>&lt;Exit&gt;</b>.</p> <div></div>

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## Modifying a Core Document, Continued


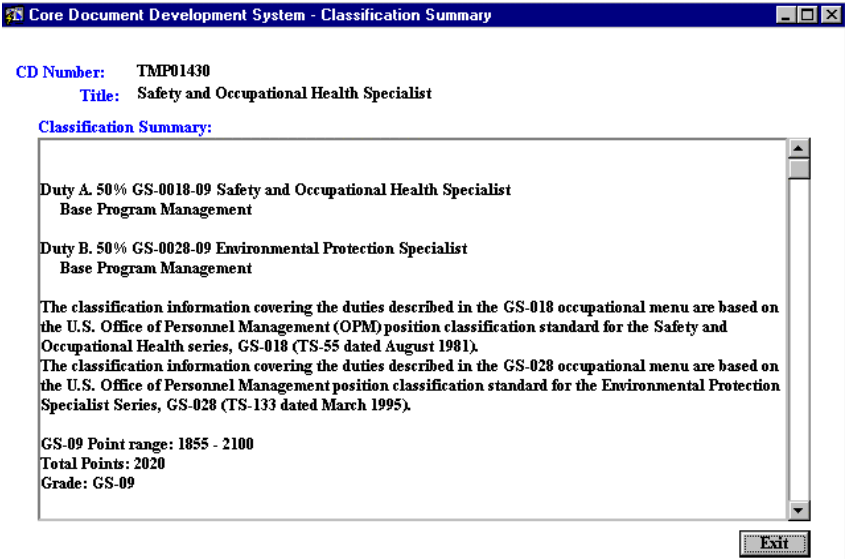
### Adding More Occupations (continued)

Step	Action
4	<p>The <b>Core Document Development System</b> window opens. The contents of the added occupation are displayed and ready to be printed, if desired. Click &lt;<b>Exit</b>&gt; to return to the Main Menu.</p> 

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## Modifying a Core Document, Continued

### Adding the Classification Summary

Step	Action
1	Click <b>E</b> dit, then click <b>C</b> lassification Summary on the Main Menu.
2	<p>The <b>Core Document Development System – Classification Summary</b> window opens. It provides a brief explanation of the basis for the classification title, pay plan, series, and grade.</p> <ul style="list-style-type: none"> <li>The CD Number and Title are at the top.</li> <li>A brief explanation states how the percentages of time for the duties affect the classification.</li> </ul> <p> <b>Note:</b> You cannot edit the information. Changes made to title, pay plan, series, any duty, factor, or Competency (KSA) made earlier will be noted here.</p> 
3	Click <b>&lt;Exit&gt;</b> to return to the Main Menu.

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## Attaching a Core Document to the Request for Personnel Action (RPA)

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<b>Purpose</b>	Many Request for Personnel Actions (RPAs) require a core document (CD). You can attach a CD to a previously completed RPA or create a new RPA and attach a CD. This procedure guides you through attaching a CD to the RPA after the position has been built.
<b>Section Contents</b>	<ul style="list-style-type: none"> <li>• Retrieving the RPA</li> <li>• Attaching the Core Document</li> <li>• Assigning a CPCN</li> <li>• Creating a Cover Sheet</li> <li>• Exiting, Saving, and Routing</li> </ul>
<b>Before You Begin</b>	<ul style="list-style-type: none"> <li>• The following sequence of events occur when attaching a CD to the RPA:               <ol style="list-style-type: none"> <li>A. Create a Core Document (CD)</li> <li>B. Preview a CD</li> <li>C. Attach a CD to the RPA</li> </ol> </li> <li>• You can attach a CD to the RPA without assigning a CPCN or a Cover Sheet, and you do not have to have a position attached to an RPA.</li> <li>• To assign a CPCN to a CD, it must first be attached to the RPA. The CPCN includes the PD# and the Sequence # as they appear on the position <b>Name</b> data field of the Position Window.</li> <li>• You can create a CD through the COREDOC Application or through the RPA.</li> <li>• In order to create or edit the Cover Sheet on the CD, it must first be attached to an RPA.</li> <li>• Only users with a classifier role can assign CPCNs and edit cover sheets.</li> <li>• The RPA Windows and buttons are explained in detail in Module 3.</li> </ul>

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# Attaching a Core Document to the Request for Personnel Action (RPA), Continued

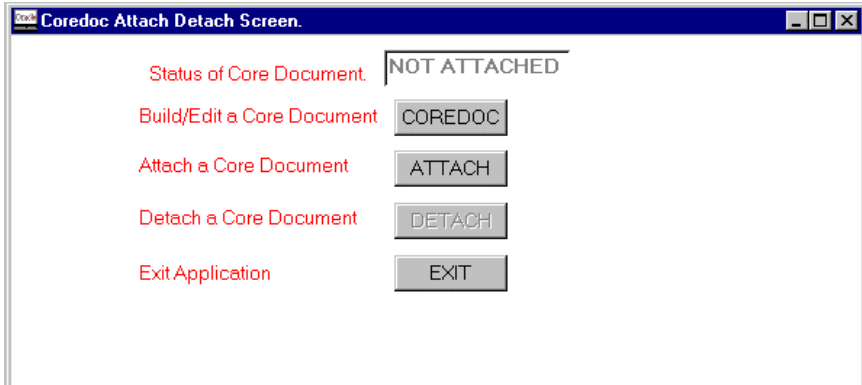
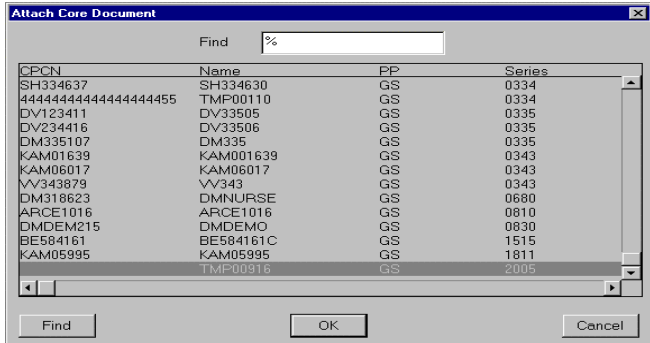
## Retrieving the RPA

Step	Action
1	<b>Navigation Path</b> <i>Request for Personnel Action</i> <i>Recruit/Fill</i> <b>&lt;Open&gt;</b> .
2	<p>Page 1 of 4 of the <b>Request for Personnel Action</b> window (Recruit/Fill) opens. You will use this RPA to attach the CD.</p> <p>With the cursor in Block 6, <b>Action Authorized By</b> data field, click the LOV on the Toolbar, click selection, and click <b>&lt;OK&gt;</b>.</p>
3	Click <b>&lt;Others...&gt;</b> .
4	<p>The <b>Navigation Options</b> window opens.</p> <p>Click <b>Coredoc</b>. Click <b>&lt;OK&gt;</b>.</p>

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# Attaching a Core Document to the Request for Personnel Action (RPA), Continued



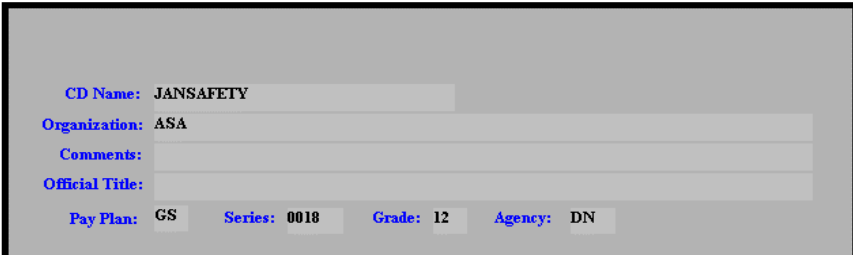
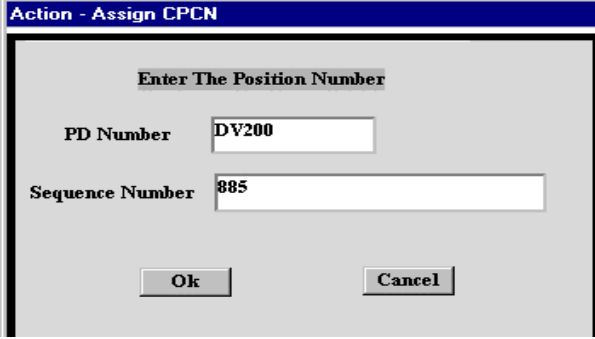
## Attaching the Core Document

Step	Action
1	<p>The <b>Coredoc Attach Detach Screen</b> window opens. Four options are listed.</p>  <p>Click <b>ATTACH</b> to attach a previously built COREDOC.</p>
2	<p>The <b>Attach Core Document</b> window opens.</p>  <p>Click the CD you want to attach to the RPA.</p>
3	Click <b>&lt;OK&gt;</b> .
4	<p>The <b>Coredoc Attach Detach Screen</b> window opens again.</p> <ul style="list-style-type: none"> <li>The <b>ATTACH</b> button has a dotted line around it to indicate the CD is attached.</li> </ul> <p>Click the <b>COREDOC</b> button to open the <b>Core Document Development System</b> Window to insure it has been attached.</p>

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# Attaching a Core Document to the Request for Personnel Action (RPA), Continued

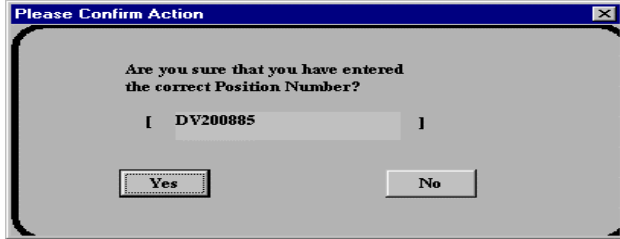
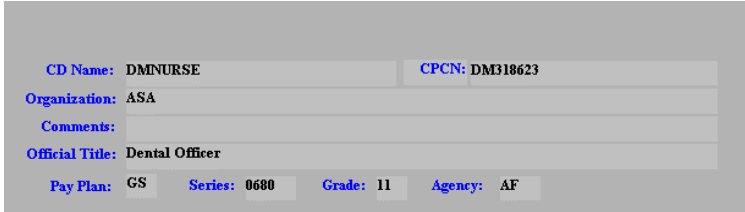
## Assigning a CPCN

Step	Action
1	<p>To assign a CPCN to the CD, click <b>Utility</b> on the Main Menu and then click <b>Assign CPCN</b>.</p> <p> <b>Note:</b> Before you can assign a CPCN to a CD, it must be attached to the RPA.</p>  
2	<p>The <b>Action — Assign CPCN</b> window opens.</p>  <p>Input the <b>PD Number</b> and the <b>Sequence Number</b>. Both numbers are from the Position Build. Click <b>&lt;OK&gt;</b>.</p>


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## Attaching a Core Document to the Request for Personnel Action (RPA), Continued

### Attaching the Core Document (continued)

Step	Action
3	<p>The <b>Please Confirm Action</b> window opens.</p>  <p>Click &lt;Yes&gt;. The <b>Record Update</b> window opens briefly.</p>
4	<p>The <b>Core Document Development System</b> window opens with the CPCN in the CPCN data field.</p> 

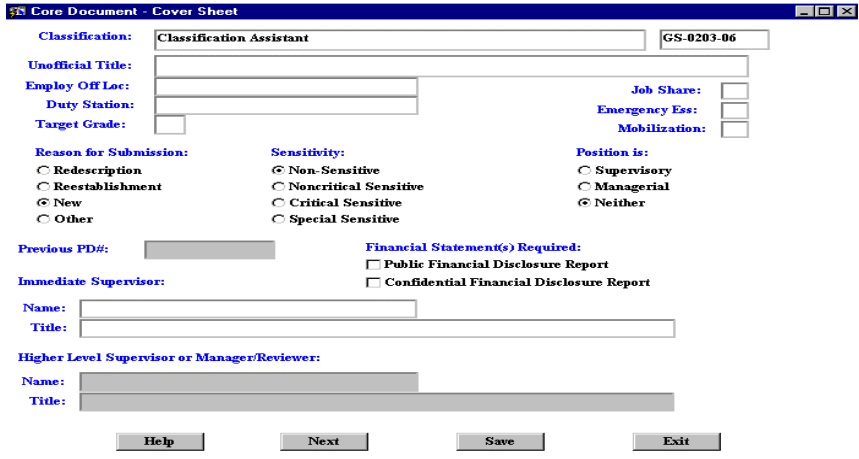
### Creating a Cover Sheet

Step	Action
<p>1 </p>	<p>Click <b>Edit</b> and click <b>Cover Sheet</b> on the Main Menu.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>The CD must be attached to an RPA to access the cover sheet.</li> <li>You must be in a Classifier or Super User role to access the cover sheet.</li> </ul>

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## Attaching a Core Document to the Request for Personnel Action (RPA), Continued

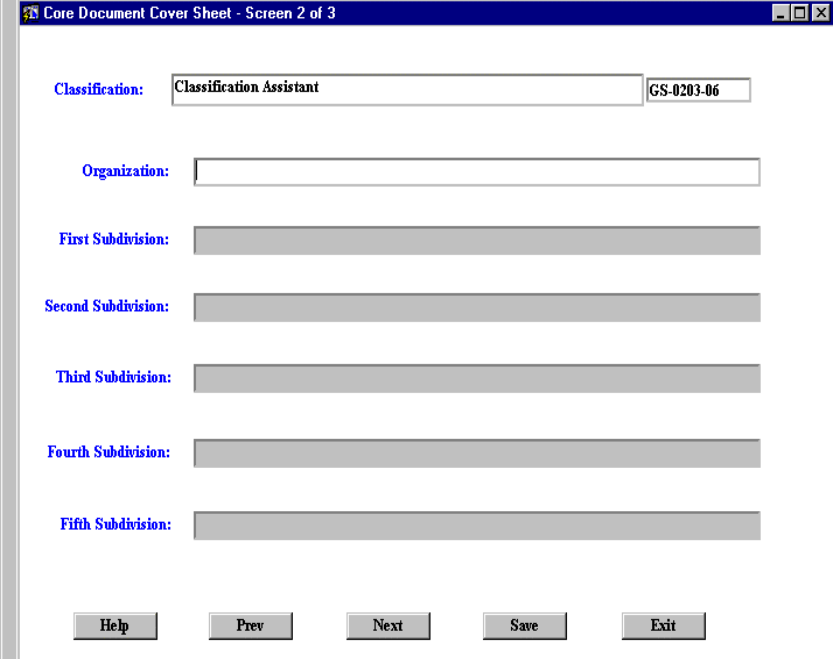
### Creating a Cover Sheet (continued)

Step	Action
2	<p>The <b>Core Document – Cover Sheet</b> window opens with four Taskflow Buttons.</p>  <p>&lt; <b>Help</b> &gt; - Accesses an LOV for a data field on the Cover Sheet.</p> <p>&lt; <b>Next</b> &gt; - Opens the next page of the Cover Sheet for viewing.</p> <p>&lt; <b>Save</b> &gt; - Saves the information entered on the window.</p> <p>&lt; <b>Exit</b> &gt; - Returns to the Main Menu Window.</p> <p>Input the information required in the data fields. Click &lt; <b>Save</b> &gt;. Click &lt; <b>Next</b> &gt;.</p>

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## Attaching a Core Document to the Request for Personnel Action (RPA), Continued

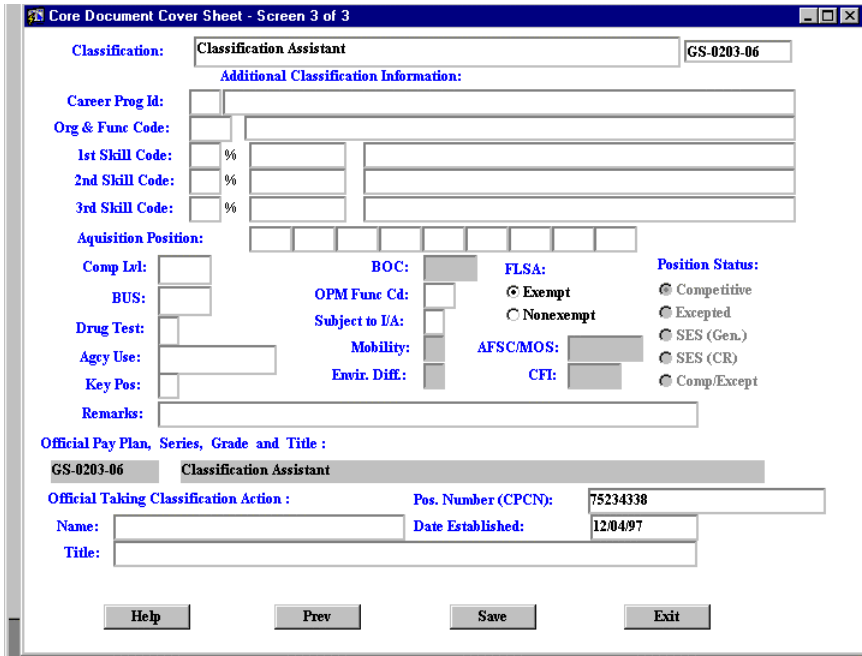
### Creating a Cover Sheet (continued)

Step	Action
3	<p>The <b>Core Document Cover Sheet – Screen 2 of 3</b> window opens. Input the required information in the data fields.</p>  <p>Click &lt;Next&gt;.</p>

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# Attaching a Core Document to the Request for Personnel Action (RPA), Continued

## Creating a Cover Sheet (continued)


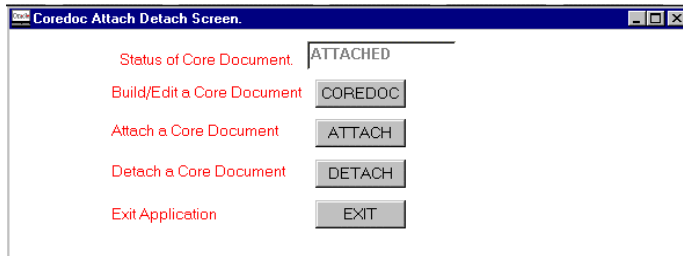
Step	Action
4	<p>The <b>Core Document Cover Sheet – Screen 3 of 3</b> window opens. Input the needed information in the required data fields.</p>  <p>Click &lt;<b>Save</b>&gt;. A <b>Dialog Box</b> opens, asking: “Do you really want to save?” Click &lt;<b>Yes</b>&gt;.</p>
5	Click < <b>Exit</b> > to return to the Main Menu.

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# Attaching a Core Document to the Request for Personnel Action (RPA), Continued


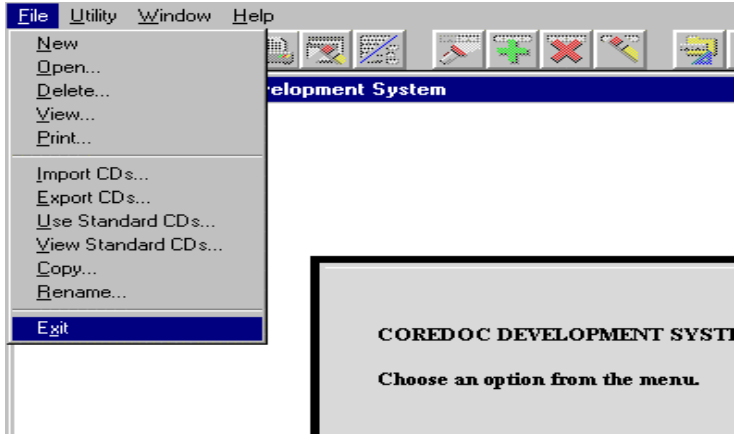
## Exiting, Saving and Routing

Step	Action
1	<p>Click <b>E</b>dit on the Main Menu Bar and then click <b>E</b>xit.</p> 
2	<p>The <b>Coredoc Attach Detach Screen</b> window opens.</p>  <p>Click <b>EXIT</b>.</p>
3	<p>The <b>Request for Personnel Action</b> window opens. Click Save on the Toolbar.</p>
4	<p>The <b>Dialog Box</b> opens and asks, “Do you wish to route the Request for Personnel Action now?”</p> <p>Click <b>&lt;Yes&gt;</b>.</p>

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## Attaching a Core Document to the Request for Personnel Action (RPA), Continued

### Exiting, Saving, Routing (continued)

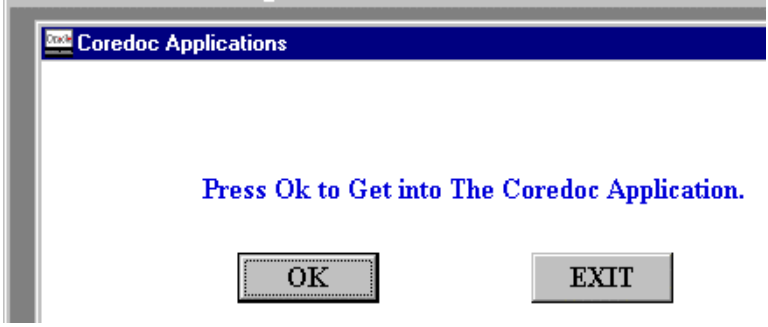
Step	Action
5	<p>The <b>Routing</b> window opens with the “Save and Hold in Personal Inbox” selected. Click <b>&lt;OK&gt;</b>.</p> 
6	<p>Click <b>F</b>ile on the Main Menu Bar of <b>COREDOC Development System</b> window. From the drop-down menu, click <b>E</b>xit.</p> 

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## Attaching a Core Document to the Request for Personnel Action (RPA), Continued

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### Exiting, Saving, Routing (continued)

Step	Action
7	The <i>Please Confirm</i> Dialog Box opens. Click <Yes>.
8	<p>The <b>Coredoc Applications</b> window opens. Click &lt;EXIT&gt;. You are returned to the <b>Navigator</b> window.</p> 

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